DOCUMENT RESUME

ED 333 525 EA 022 724

| | |
|---|---|
| AUTHOR | Filby, Nikola N., Ed.; And Others |
| TITLE | Resource Guide for Middle Grades Reform: A Casebook for School Leaders. |
| INSTITUTION | County Superintendents' Association of California.; Far West Lab. for Educational Research and Development, San Francisco, Calif. |
| SPONS AGENCY | Office of Educational Research and Improvement (ED), Washington, DC. |
| PUB DATE | Sep 90 |
| CONTRACT | 400-86-0009 |
| NOTE | 211p.; For a related document, see EA 022 723. |
| PUB TYPE | Guides - Non-Classroom Use (055) -- Tests/Evaluation Instruments (160) |
| EDRS PRICE | MF01/PC09 Plus Postage. |
| DESCRIPTORS | Brainstorming; Change Strategies; *Educational Change; Intermediate Grades; Junior High Schools; *Leadership Training; Metaphors; *Middle Schools; Organizational Change; Resistance to Change; *Resource Materials; *School Restructuring; Worksheets; *Workshops |

ABSTRACT

The resource guide consists of a Metaphor Module which is designed to be conducted with an audience of school leadership teams. Teams from several schools, in the same district or in different districts, can come together for the day-long workshop. The morning is spent learning the language of a nautical journey as a metaphor for the middle-grades reform process; the afternoon focuses on asking questions as a critical activity to support targeted and effective school reform. An outline of the module lists time, training sequence, and materials and equipment, followed by supplementary material. Appended are lists of the following resources for middle grades: state and national reform documents; California League of Middle Schools Publications; professional organizations; National Middle School Association (NMSA) annotated publication resources; NMSA video resources; California Department of Education Office of Middle Grades Support Services; Regional Networks of Middle Grades Partnership and Foundation Schools; Regional Networks of Middle Grades Partnership Schools Expansion Network; California Curriculum Projects; California State Department of Education publications; major themes from "Caught in the Middle: Educational Reform for Young Adolescents in California Schools," characteristics of middle-grade students distilled from five writers; and a two-page summary of "Caught in the Middle." (MLF)

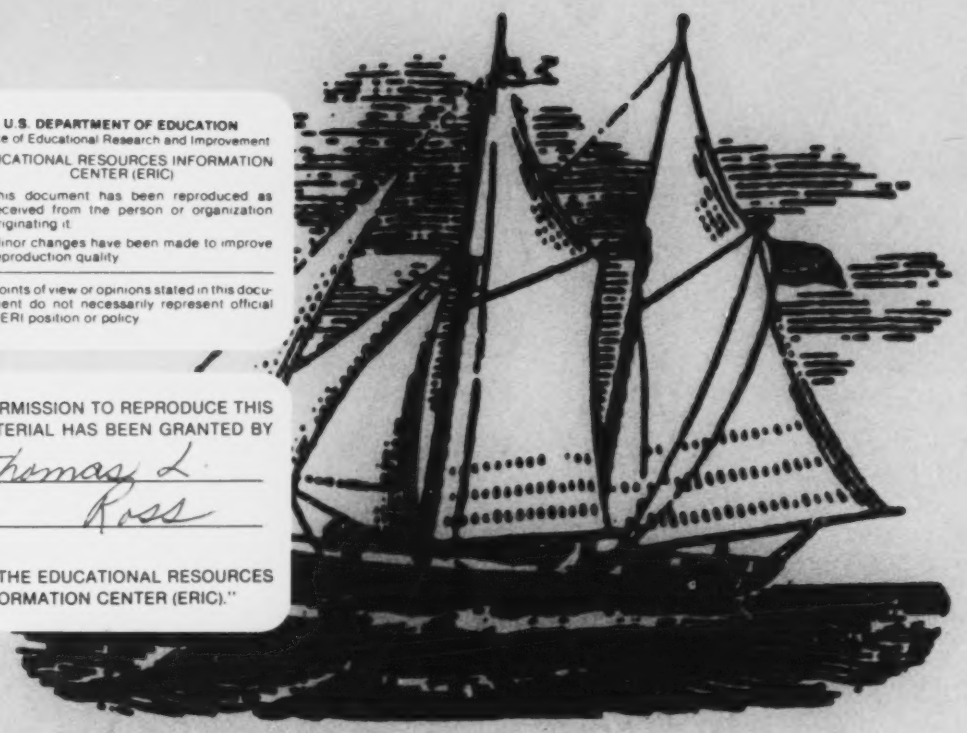
**********
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
**********

ED333525

# RESOURCE GUIDE

for

## Middle Grades Reform: *a Casebook for School Leaders*



U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☒ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Thomas L. Ross

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

EA 022 724

. Far West Laboratory for Educational Research and Development .

. California Association of County Superintendents of Schools .



BEST COPY AVAILABLE

RESOURCE GUIDE

for

**Middle Grades Reform:**
*A Casebook for School Leaders*

Nikola N. Filby
Stanley A. Schainker
Ginny V. Lee
Sharon-Ann Croughwell

September, 1990

**Resource Guide for Middle Grades Reform:** *A Casebook for School Leaders* is published by the Far West Laboratory for Educational Research and Development. The publication is supported by federal funds from the U.S. Department of Education, Office of Educational Research and Improvement, contract no. 400-86-0009. The contents of this publication do not necessarily reflect the views or policies of the Department of Education, nor does mention of trade names, commercial products or organizations, imply endorsement by the United States Government.

Background on
# THE METAPHOR MODULE

## Audience

The Metaphor Module is designed to be conducted with an audience of school leadership teams. Teams from several schools, in the same district or in different districts, can come together for the workshop. The ideal audience size is between 18 and 36 people.

An ideal school leadership team, for the purposes of this workshop, would have 6 members. A school team of 6 people can be its own home base group for the jigsaw activity and can have a representative on each expert group. School teams of less than 6 members can be accommodated by combining schools for some activities. School teams of more than 6 members can also be accommodated, but the size should not become too large for effective functioning as a team during planning activities.

Possible members for a school team include:

- school principal (should be required, if possible)
- assistant principal
- counselor
- mentor teacher
- leader of teaching team
- SIP committee member
- union representative
- department chairperson

## Specifications

The Metaphor Module is a day-long workshop. The morning is spent learning the language of a nautical journey as a metaphor for the middle grades reform process. This is done primarily through a jigsaw activity using **Middle Grades Reform:** *A Casebook for School Leaders*. The afternoon focuses on asking questions as a critical activity to support targeted and effective school reform. The framework of the metaphor is used to guide teams as they think about self-assessment activities they could conduct back home.

BEST COPY AVAILABLE

## Preparation

This workshop is based on several assumptions:

1. The audience **already has** a familiarity with the key concepts of middle grades reform, such as interdisciplinary teaming, teacher advisory, etc. They will have read key documents such as *Caught in the Middle.* They are familiar with the **what** of middle grades reform and interested in thinking about the **how.**

2. The audience may vary considerably in the extent of their implementation of middle grades reform. Some may be well under way in their journey; some may be just getting started. The workshop will accommodate these differences and even be strengthened by them.

3. The school leadership team concept is **understood and accepted** by the principal. He or she has brought the group to this workshop with the expectation that they will all contribute to decision-making and to follow-up activities back home. The scope of responsibility given to the team and their history as a group may well vary.

These assumptions suggest that some preparatory work may need to be done. For instance, a presentation to site administrators about the workshop may be necessary in order for them to commit a leadership team to the activity. Recruitment of sites might be selective, based on knowledge of their past history. Or, this workshop might be combined with other events in a series that begins with background/awareness activities on middle grades reform and provides ongoing development of leadership teams.

## Follow-up

Like all day-long workshops, this one should not stand alone. Schools will need follow-up support. Possible options are:

- additional inservice drawn from the Supplementary Workshops
- individual contacts to answer questions and offer encouragement
- brokering of contacts between sites and with other outside resources
- facilitating a follow-up meeting for progress reports and problem solving

## METAPHOR MODULE

### Sequence Summary

| TIME | ACTIVITY | MATERIALS |
|---|---|---|
| 5 | Welcome | T-1 goals<br>Chart agenda |
| 5 | Middle grades warm-up | T-2 question<br>Chart school |
| 10 | Metaphor warm-up | T-3 question |
| 10 | Introduce metaphor elements and casebook | Chart journey labels |
| 30 | Locating your ship activity | T-4 instructions/roles<br>W-1 questions<br>W-2 group form<br>T-5 instructions |
| 1 hr. + 55 min. | Metaphor jigsaw | T-6 instructions<br>W-3 expert questions<br>W-4 quiz<br>T-7 answers |
| | LUNCH | T-8 seating |
| 10 | Metaphor review | T-9 question |
| 10 | Overview of afternoon | T-10 key point |
| 20 | Generating questions | T-11 instructions<br>W-5 questions |
| 20 | Ways to collect data | T-12 instructions<br>W-6 worksheet |
| 10 | BREAK | |
| 55 | Team planning | W-7 worksheet<br>T-13 instructions |
| 15 | Sharing | |
| 10 | Closure | T-14 questions<br>W-8 reflection sheet |

# METAPHOR MODULE – MORNING

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| (5 total) | <u>WELCOME</u> | |
| 5 | Welcome participants. Have each school group identify the name and location of the school. Present the goals (on overhead) and agenda (on chart).<br>*Agenda:*<br>• *Overview and Warm-Up*<br>• *Introducing the Metaphor*<br>• *Locating Your Ship*<br>• *Understanding the Metaphor*<br>• *Asking Questions*<br>• *Team Planning for Self-Assessment*<br>Point out that the bottom line is to learn a way of thinking and talking about school change and to apply those ideas to one's own site. Show how the agenda alternates between learning new ideas and time for application and self-analysis. | T-1 goals<br>Chart: agenda |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| (5 total) | MIDDLE GRADES WARM-UP | |
| 5 | Explain that since today's focus is on middle grades reform, we want to warm up by reviewing the characteristics of effective middle grades education. Remind the participants of materials they have read or previous workshops they may have attended. [For example, *Caught in the Middle.*] Turn to the chart with a school outline on it. Use the overhead to set the question in people's minds:<br>*How would you know this is a middle grades school? What would you expect (or hope) to see?*<br>List characteristics on the chart as people call out ideas.<br><br>Transition to the next activity by pointing out that we assume their schools have some but not all of these features, that they are serious about finding better ways to serve their students, and that they have questions about HOW to proceed. The focus for the day is on the HOW, the process of change in middle grades schools. | T-2 question<br>Chart: school |
| (10 total) | METAPHOR WARM-UP | |
| 1 | Explain that in the research on which this workshop is based, the process of change, the process of middle grades reform, is captured and communicated through a metaphor. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 2 | Remind the group that a metaphor is "a word or phrase that literally denotes one object or idea but is used in place of another to suggest a likeness or analogy between them." For example, professional development can be likened either to plants blooming in a garden or to innoculating against disease. The metaphor creates a visual image and seems to explain how things work. | |
| 2 | Tell the participants that metaphors have value in fields such as creative writing, journalism and advertising because they can:<br>• *make abstract ideas more concrete and understandable*<br>• *simplify complex ideas, and*<br>• *add drama and excitement to an idea, thus stimulating others' interest* | |
| 5 | Explain that the metaphor used for middle grades reform is a nautical journey. Show the overhead and paraphrase:<br>*Imagine a school undertaking a change project or a reform. In what ways can that be likened to a ship undertaking an ocean journey?* | T-3 question |
| | Ask participants to turn to their neighbor and share their responses. After 1 minute ask for volunteers to share with the whole group. Responses can be charted and referred to in the next activity. | chart paper |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| (10 total) | **INTRODUCE FWL METAPHOR ELEMENTS AND CASEBOOK** | |
| 1 | Introduce the metaphor elements used in the Casebook:<br>*As FWL studied middle grades reform and worked with the nautical metaphor, they identified **six** elements that helped capture the important aspects of how school leaders described their journeys. We will be studying these and applying them in depth as we work together today.* | |
| 5 | Briefly introduce the six elements using the chart of the ship on the sea, tacking on each name as described:<br>• *Getting Launched – Somehow the school (ship) gets started on the new journey.*<br>• *Establishing a Destination – The school (ship) needs to have an idea of where it is going*<br>• *Supporting the Crew – The ship's captain needs to have the crew involved in ways that help achieve the destination*<br>• *Navigating – The ship needs to be kept on course and needs to respond to changes in the environment*<br>• *Ports of Call – Along the way, the ship spends time at various ports to take on supplies*<br>• *Not Alone at Sea – Other ships and communications with land can help the journey* | Wall chart of journey<br>tack-on labels |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Summarize by showing how these six elements reflect their brainstorm of how school reform is like an ocean journey. | |
| 3 | Introduce the Casebook. Explain that it is organized around the nautical metaphor and that it contains stories written by and about California middle grades educators on their journeys. Some cases are long; some are short. Some focus on just one element of the metaphor, e.g. Getting Launched, and show the variety of different ways schools have gone about this. No two journeys look quite the same. Emphasize:<br>• *All participants will receive the Casebook to look through at their leisure.*<br>• *The Casebook contains a wide variety of stories of all kinds of journeys.*<br>• *The "big picture" of middle grades reform, the underlying pattern, is well captured by the metaphor, and that is the focus of the day's session.* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| (30 total) | LOCATING YOUR SHIP ACTIVITY | |
| 1 | Remind people that today's focus is on using the metaphor language as a tool for analyzing and planning change in their own school sites. The starting point for their own self-analysis is to look at their current position and conditions. This is partly assessing the external context for their reform efforts and partly an internal scan of conditions at their school site. Before digging more deeply into the metaphor and issues of how to move ahead, let's take stock of where they are now on the journey of middle grades reform:<br>*Each of you is on a ship somewhere on the ocean of education. Let's think about 3 things that are relevant to the future of your middle grades journey:*<br>• *Where are you now in the water?*<br>• *What is the condition of the ship?*<br>• *What are the weather conditions?* | |
| 15 | Introduce the task: Locating your ship. Using the overhead, instruct each school team to work as a group, with someone appointed as a facilitator, a questioner, and a recorder. Everyone else is to help contribute. Give a time limit of 15 minutes.<br>EMPHASIZE that the different members of the group may have different answers to these questions. The goal is not superficial consensus but the beginning of an exploration of staff perceptions. They should record all these multiple viewpoints. | T-4 instructions<br>W-1 questions<br>W-2 form |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 9 | At the end of the self-inventory, say that in keeping with the visual nature of the metaphor there is a special way for schools to report out–draw a picture. Use the overhead to refocus the groups on the three elements to include in their drawing. Give each group a piece of chart paper and several pens. Reassure them that artistic skill is not the issue; just make a quick sketch that illustrates their image (or images). Set a time limit of 8 minutes. As groups begin to finish, post their products. | T-5 instructions<br><br>Chart paper |
| 5 | Give each group 1 minute to interpret its chart for the whole group. | |
| **(1 hr, 55 min total)** | **METAPHOR JIGSAW** | |
| 3 | Introduce the jigsaw activity. We've had fun with the metaphor and taken a first look at where schools are in their journeys, but the metaphor has more depth than it might first appear. The Casebook uses one long story – the Crystal case – to show the different forms a metaphor element might take and how the elements come up repeatedly and fit together in different ways. Later sections of the Casebook give a little theory and several different case examples of each element. We want them now to dig in, read, think, and discuss the metaphor elements in detail. This will be done through a jigsaw. Use the overhead to explain the procedure and assignments. | T-6 jigsaw assignment |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Form groups. Each home team needs 6 people. Use school teams or combinations of school teams to form home team groups. Within home teams, have people count off to form expert groups.<br>NOTE: With fewer than 18 people, combine Getting Launched and Establishing a Destination. This means 5 instead of 6 expert groups, and home teams of 5 or more. | |
| 25 | Monitor time for individual reading. Move people into expert group discussion after about 25 minutes. | |
| [10] | [Take a BREAK as it fits the schedule, during or after reading.] | |
| 20 | Monitor expert groups. Review instructions using the overhead. Focus groups on key questions as needed. | T-6 instructions<br>W-3 expert study questions |
| 30 | Have people reform home teams. Review instructions using the overhead. Pace home teams through 5 minute turns per element. (Use a kitchen timer.) | T-6 instructions |
| 10 | Introduce checking for understanding activity – a group quiz. Pass out one sheet for each group and ask them to discuss quickly and come to a consensus decision. Allow about 10 minutes working time. | W-4 quiz |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Check the quiz as a group. Use the overhead with blanks; fill in each one as you ask for their response. Go back and ask about those where they had other answers. Ask for their rationale. Acknowledge that there is more than one right way to think of these.<br>ANSWERS:<br>1. D 6. F<br>2. E 7. D<br>3. A 8. C<br>4. B 9. B<br>5. C 10. C | T-7 answers |
| (90 total) | **LUNCH** | |
| | As people come back from lunch, use the overhead to ask them to sit in expert groups. | T-8 seating |

# METAPHOR MODULE – AFTERNOON

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| **(10 total)** | **METAPHOR REVIEW** | |
| 10 | Review morning activities that introduced the metaphor. Ask participants to reflect on the value of the metaphor. Use overhead to frame questions. Ask for volunteer responses and chart them.<br>*(If these advantages do not surface, you may want to add them to the master list:*<br>• *Simplify the complex*<br>• *Help to clarify and emphasize what is really important*<br>• *Provide a common language that helps to bind people together*<br>• *Provide a common frame of reference with which people can quickly get in touch*<br>• *Lend themselves to visual images that can capture the imagination, facilitate recall, and build commitment*<br>• *Provide a common framework for collecting and analyzing information*<br>• *Serve as a vehicle for facilitating the generation of problem solutions*<br>• *Provide safe distance from real-life situations*<br>• *Encourage openness*<br>• *Encourage playfulness)* | T-9 questions<br>chart paper |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| (10 total) | <u>OVERVIEW OF THE AFTERNOON</u> | |
| 3 | Bridge from the metaphor review activity just completed into the schedule for the afternoon. Point out that they have recognized a number of advantages to using metaphors. This afternoon we want to capitalize on the metaphor language as a framework for self-assessment. We want to help them harness and plan to use the metaphor language as a way to foster dialog and self-assessment back home. Our central belief (show overhead) is that:<br>*Success in school reform depends on ASKING QUESTIONS.* | T-10 key point |
| 2 | The afternoon focuses on asking questions – figuring out what questions to ask, deciding how to collect information, and planning local assessment activities.<br>NOTE: The use of the phrase "asking questions" should not be taken too literally. The leadership team should be asking these questions in their own mind. They may or may not ask them out loud. There are many ways to collect data, and we'll be covering that during the afternoon. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Acknowledge that to some people this may seem very open-ended. They may have come for answers; we are giving them questions. Acknowledge that there are no guaranteed answers. Stress that the goal is to help them work smarter instead of harder, to help them target their efforts appropriately for their own site rather than just go "full steam ahead." Ask people to share with a partner how use of the metaphor for self-assessment could help them in the long run. Let people buzz for 1 minute. Ask for responses and chart them. | Chart paper |
| (20 total) | <u>GENERATING QUESTIONS</u> | |
| 18 | The first step is to think about what questions to ask. What would you want to know to assess whether a school was launched toward a shared destination, to know how (and how well) the school could navigate? In the morning activity, we took a look at the ship within its context. Now, having looked more closely at the metaphor, we want to think about a more detailed assessment of the things that have to be considered for the ship to proceed. Use the overhead to give directions for participants (in their expert groups) to expand on the starter list of questions. | T-11 instructions<br><br>W-5 questions |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 2 | At the end of this activity, collect from each group an expanded list of questions. Have these photocopied for use later in the session during team planning.<br>NOTE: You have 30 minutes, including the break, to do this copying. If no copier is available, have participants write their questions on butcher paper and post. | |
| (20 total) | <u>WAYS TO COLLECT DATA</u> | |
| 5 | Now that they have many questions in mind, the next step is to think of ways to get answers to those questions. There are a number of possibilities. Together, the group should brainstorm a list of data collections methods. Record the list on chart paper in a place where it can remain visible.<br>EXAMPLES to prime the pump:<br>• *asking a question at a staff meeting*<br>• *doing a casebook based activity to start discussion*<br>• *asking informally*<br>• *sending out a questionnaire*<br>• *looking for evidence in people's behavior* | Chart paper |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 9 | Note that not all ways of collecting data are appropriate for every question. Moveover, the choice will be influenced by the school site, its regular practices and norms, and the sensitivity of the issue. While one school might send out a questionnaire about an issue, another might want to approach the issue more informally. Assign to each expert group one or more of the data collection methods from the brainstorm list. Use the overhead to instruct them to think about their assigned methods, when they might be appropriate and when they might not. They should make notes on the worksheet and be prepared to share highlights with the whole group. | T-12 instructions<br><br>W-6 worksheet |
| 6 | Ask each group to share the highlights of their discussion in no more than 1 minute per group. | |
| (10 total) | **BREAK** | |
| (55 total) | **TEAM PLANNING**<br><br>After the break, have participants take seats in their school team groups. | |
| 2 | Introduce team planning by saying that the last activity will allow them to think together as a leadership team about their own school site. No doubt during the other afternoon activities they have been mentally sorting and filing ideas in terms of their usefulness for their specific site context. Now is the time to pool those ideas and make some group decisions. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Go over the worksheet. Call attention to each of the columns. With the group, generate one way to fill each cell in the top row, or offer the following example:<br>• *Getting Launched*<br>• *Do people at our school share the feeling that we are underway?*<br>• *Conduct short metaphor activity with the staff*<br>• *High priority (assuming school is serious about change effort)*<br>• *High sensitivity (important that this activity leads somewhere for the staff)*<br>• *Opportunity = scheduled staff development day that is coming up* | W-7 worksheet |
| 30 | State the task: Each group should use the worksheet as they find appropriate but focus on how they can carry forward self-assessment at their own site. You may want to remind them of the roles used in an earlier activity. This is an especially good time to use roles for effective group processing. Set a work time of 40 minutes. Circulate and work with individual groups as needed. | (T-4 roles: optional review) |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Interrupt the groups to announce the end of work time when they have 10 minutes left. Use the overhead to encourage each group to stop now and reach closure on next steps.<br>• *Have they decided on some specific actions?*<br>• *Do they need to meet again as a group?*<br>• *Do they need to communicate with someone about their plans?*<br>They should be prepared to share the highlights of their deliberations and next steps with the whole group in 10 more minutes. | T-13 worksheet |
| (15 total) | SHARING | |
| 15 | Ask each group in turn to share the highlights of their discussion. What are their next steps back home? | |
| (10 total) | CLOSURE | |
| 5 | Ask each person to reflect individually. Use the overhead to focus their thoughts on completing the two sentences on their reflections sheet:<br>• *Four months from now I hope our school...*<br>• *We could use more help on...* | T-14 closure<br>W-8 reflections sheet |
| 5 | Ask volunteers to share their responses.<br>NOTE: You can collect the closure worksheets as feedback to yourself for follow-up planning. | |

# QUESTIONS FOR LOCATING YOUR SHIP

## A. Position in the Water

- Where is our school now with respect to Middle School land?
- How well are we meeting the special needs of our middle grades students?
- Do we all agree on where we are headed?
- Have we visited many ports of call and incorporated middle school features or are we just getting started?

## B. Present condition of our ship

- How "seaworthy" is our vessel?
- What are the physical conditions (size, condition of physical plant, crowding, school climate, equipment, facilities, etc.)?
- What is the condition of the crew (overworked, eager, cooperative, disgruntled, unstable, entrenched, ready to mutiny)?
- What resources have we got to work with?
- What factors (positive and negative) about the ship and its crew are most important to consider as we think about the journey?

## C. Current weather conditions

- What are the current conditions in the sea around us?
- What "weather" is forecast for the coming months?
- What "winds of change" are coming from the district? community? state?

# LOCATING YOUR SHIP
## Group Inventory Form

Name of School: _____
Date of Inventory: _____

A. Position in the Water

B. Present condition of our ship

C. Current weather conditions

# EXPERT GROUP STUDY QUESTIONS

## Expert Group A: Getting Launched

*The process through which the school starts to implement middle grades reform. The activities that help the vessel begin its journey to Middle School Land.*

Having read both the introduction to this element (pages 19 to 22), and the Crystal Case (pages 12-18), use the following questions for group discussion in your expert group:

- What does it mean to "get launched"?
- What events launched Crystal on its journey?
- What in the Crystal case makes it difficult to pinpoint its launch?
- What do the above suggest about how **Getting Launched** on the journey of middle school reform is different from, say, getting launched on a cruise ship journey to Alaska?

## Expert Group B: Establishing a Destination

*The process through which the school staff establishes its reform vision. The activities that help the crew decide where in the vast continent of Middle School Land they want to end up.*

Having read both the introduction to this element (pages 27 to 28), and the Crystal Case (pages 12-18), use the following questions for group discussion in your expert group:

- What does it mean to "establish a destination"?
- What activities did Crystal use to establish its destination?
- Who was involved? Over what period of time? What does this suggest about the process?
- How is **Establishing a Destination** in middle grades reform different from looking at a map and choosing a harbor where the journey will end?

## Expert Group C: Supporting the Crew

*The process through which school leaders involve the staff in ways that will contribute to a successful effort. The process of developing and supporting the entire crew as a working team.*

Having read both the introduction to this element (pages 37 to 39), and the Crystal Case (pages 12-18), use the following questions for group discussion in your expert group:

- What does it mean to "support the crew"?
- What strategies were used at Crystal to support the crew? What kinds of staff needs were these intended to address?
- How did the overall journey benefit from these strategies?
- How is **Supporting the Crew** on a difficult journey similar to, and different from, supporting the crew at other times?

## Expert Group D: Navigating

*The process of keeping the school moving in the necessary direction to achieve the final destination. The process of monitoring and responding to conditions on the ship and in the environment to assure a successful journey.*

Having read both the introduction to this element (pages 63 to 66), and the Crystal Case (pages 12-18), use the following questions for group discussion in your expert group:

- What does it mean to "navigate"?
- What tools were used at Crystal to help the navigating process? Who was involved?
- What new structures/activities/policies were put in place during the reform effort?
- What communication channels were used?

## Expert Group E: Ports of Call

*The process of implementing specific elements associated with middle grades reform. The ways in which the vessel stops at various places to take on cargo, supplies, etc. that make it have more and more of the characteristics associated with middle schools.*

Having read both the introduction to this element (pages 79 to 84), and the Crystal Case (pages 12-18), use the following questions for group discussion in your expert group:

- What does it mean to visit "ports of call"?
- What **Ports of Call** did Crystal visit? What factors were taken into account in doing so? What timelines were used?
- How does the idea of visiting **Ports of Call** help clarify the process of achieving the final destination? What does this suggest about the process of becoming a middle school?

## Expert Group F: Not Alone at Sea

*The process of networking and using resources outside the school to support change efforts.*

Having read both the introduction to this element (pages 93 to 94), and the Crystal Case (pages 12-18), use the following questions for group discussion in your expert group:

- What does it mean that a ship is "not alone at sea"?
- What links did Crystal make with other resources? What elements of the journey did these links help support?
- Why is the idea of being **Not Alone at Sea** an important one? What does this suggest for a vessel about to embark on a middle grades journey?

# METAPHOR COMPREHENSION CHECK

*As a team, decide for each statement below which element of the metaphor would most apply:*

A. Getting Launched
B. Establishing a Destination
C. Supporting the Crew
D. Navigating
E. Ports of Call
F. Not Alone at Sea

____ 1. Conducting our annual self-review brought many issues to light and made it apparent that we still had some work to do.

____ 2. We have implemented the initial stages of team teaching, and together we are looking forward to progressively implementing other advances toward a "middle school program."

____ 3. "I wanted to explore the middle grades reform ideas and see what they could mean for my school." (Statement by a principal.)

____ 4. Teams of teachers visited several middle schools to see what they looked like and reported back to the whole staff.

____ 5. "I then began a program for recognizing achievement of the teams and gave praise for the teachers willing to take the risk of trying something new." (Statement by a principal.)

____ 6. A county office staff member reports that she facilitates the joint effort of ten schools from several districts to implement middle school reform: "This multi-school effort provides teachers with a rich fund of ideas."

____ 7. Our Advisory program was degenerating at the same time that SIP was focusing on the need to improve students' problem solving skills, so I decided to implement problem solving as part of the Advisory.

____ 8. As more teachers shared in the decision-making process, they developed a sense of belonging and ownership of the school.

____ 9. Our school explored a lot of ideas about middle grades reform. Committees wrote recommendations that were discussed and voted on by staff during a minimum day; these were then formed into a plan.

____ 10. A few inservice hours a year was sufficient for teachers to identify common experiences and solve problems, but they discovered that a few days of working, sharing meals, and having fun together (in a retreat) created a special bond and afforded the luxury and satisfaction of being creative.

# METAPHOR QUESTIONS:
## Getting Launched

1. Are we launched?
2. Does everyone agree that we are in the process of middle grades reform?
3. Where did the pressure for middle grades reform come from?

# METAPHOR QUESTIONS:
## Establishing a Destination

1. Where are we headed?
2. What are the key elements of our vision?
3. Does everyone share the same vision?
4. Are there identifiable cliques or subgroups within the staff?
5. What activities have we engaged in to establish a destination?

# METAPHOR QUESTIONS:
## Supporting the Crew

1. What strengths or resources do we have within our staff?
2. How well do staff members work together?
3. Is leadership shared among different role groups?
4. Are there people who have not "bought in"?
5. How is support provided for staff members? How are they encouraged and stimulated?
6. What factors detract from staff morale?

# METAPHOR QUESTIONS:
## Navigating

1. What navigational tools do we have available to help us monitor and stay on course?
2. What structures can we use to monitor on a regular basis where we are and where we are going?
3. How are decisions made at our school?
4. How do we cope with problems when they come up?
5. Have we changed course over time? How did it happen?

# METAPHOR QUESTIONS:
## Ports of Call

1. Which ports have we visited?
2. Are we in port now? Where?
3. Is the cargo we took on at the last port still in good condition?

# METAPHOR QUESTIONS:
## Not Alone at Sea

1. How do we communicate with other ships on their journeys?
2. What outside resources are available to help us?

# DECIDING ABOUT WAYS TO COLLECT INFORMATION

Write in the left column the procedures assigned to your group. Discuss and fill in the other boxes.

| Procedure | Use When? | Do Not Use When? |
|---|---|---|
| | | |
| | | |
| | | |

# SELF-ASSESSMENT WORKSHEET

| Metaphor Element | Questions to Ask | How Collect Data | Level of Priority | Level of Sensitivity | Opportunities for action |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |

# REFLECTIONS

1. Four months from now, I hope our school . . .

2. We could use more help on . . .

# Today's Goals

- Learn and apply the language of a metaphor for school change.
- From a case description, analyze one school's approach to middle grades reform.
- Use group discussion to stimulate each other's thinking about issues in leading school change.
- Use the metaphor as a framework for self-assessment.
- Plan local assessment activities.

# Elements of Middle Grades Reform

How would you know this is a middle grades school?

What would you expect/hope to see?

# Metaphor Warm-Up

Think about a school in the process of implementing middle grades reform.

How might this be like a ship on a journey?

Discuss with a partner.
Be ready to share in ___ minutes.

**TASK:** As a group, make an inventory of your present situation:

- Where are you in the water?
- What condition is your ship in?
- What are the weather conditions?

Use one Group Inventory Form to record your ideas.

**ROLES:**

Facilitator: Monitor time; make sure task is accomplished; move group along; keep everyone involved.

Questioner: Use the 3 sets of questions to prompt discussion; clarify meaning of questions when needed.

Recorder: Complete one inventory form for the group; be sure it reflects main ideas of the group.

Everyone: Contribute to inventory; check for accuracy and completeness of group response.

## Draw a picture that locates your ship

- Where are you in respect to middle school land? Close? Far away? Facing the wrong direction? Lost?
- What does your ship look like? What about the crew?
- What weather is coming?

# Metaphor Jigsaw Assignment

**Individual:**

Read: Introduction to Element Crystal Case — *25 minutes*

**Expert Group:**

Discuss: Study Questions
What to report back — *20 minutes*

**Home Team:**

Explain: The meaning of your metaphor element, with examples from Crystal — *6 turns of 5 minutes = 30 minutes*

## Answers to the Quiz

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Please sit

in your

EXPERT GROUP

# What Does the Nautical Metaphor Contribute?

In what ways is the metaphor a useful tool for describing the process of middle school reform?

What ideas about school change does it suggest?

What "realities" about leading a school does it help communicate?

Success in
school reform
depends on

ASKING QUESTIONS

**In your group, look at the starter list of questions.**

What would you want to know to assess your school's strengths and weaknesses?

What questions would get below the surface?

Add questions to the list.

✡ Star what you consider to be key questions.

Be prepared to turn in an expanded list in ___ minutes.

Write in the left column the procedures assigned to your group.

Discuss when you would use this procedure and when you would not.

Use the worksheet for notes.

Be prepared to share in___ minutes.

Take stock of where you are now
in this process.

Have you reached any decisions?
How will you continue as a group?
What are your next steps?

Be prepared to share in ___ minutes.

Four months from now
I hope our school. . .

We could use more
help on. . .

## DIRECTORY OF SUPPLEMENTARY WORKSHOPS

| NUMBER | CASEBOOK SECTION | TITLE |
|---|---|---|
| 1 | Metaphor | Using Metaphors to Facilitate Organizational Change |
| 2 | Metaphor | Understanding Important Elements of the Process of Organizational Change |
| 3 | Metaphor | Creating Alternative Metaphors for the Important Elements of Organizational Change |
| 4 | Crystal Case | Identifying and Testing Assumptions Regarding Organizational Change |
| 5 | Crystal Case | Anticipating and Dealing with Resistance to Middle Grades Reform |
| 6 | Crystal Case | Anticipating and Dealing with Resistance |
| 7 | Getting Launched | Assessing a Staff's Readiness to Embark on the Journey of Middle Grades Reform |
| 8 | Getting Launched | Launching Middle Grades Reform |
| 9 | Getting Launched | Examining the Launching of Middle Grades Reform |
| 10 | Establishing a Destination | Establishing a Destination |
| 11 | Establishing a Destination | Identifying Some Basic Ways of Developing a Shared Vision of the Destination |
| 12 | Establishing a Destination | Identifying the Shared Values and Beliefs in a School |
| 13 | Supporting the Crew | Getting the Crew to "Buy In" to the Journey |
| 14 | Supporting the Crew | Training the Crew to Take Command |
| 15 | Supporting the Crew | Empowering the Crew to Assume Some Leadership During the Voyage |

| NUMBER | CASEBOOK SECTION | TITLE |
|---|---|---|
| 16 | Supporting the Crew | Keeping the Crew Focused on Their Destination |
| 17 | Navigating | Staying on Course – Monitoring the Ship's Progress and Making Course Corrections |
| 18 | Navigating | Staying on Course - Dealing Successfully with Unanticipated Problems |
| 19 | Ports of Call | Recharting the Ship's Course While at Sea |
| 20 | Not Alone at Sea | Minimizing the Chances of Getting Lost Out at Sea |
| 21 | Ships' Logs | Learning About the Voyage of Middle Grades Reform from Another Ship's Log, No. I |
| 22 | Ship's Logs | Learning About the Voyage of Middle Grades Reform from Another Ship's Log, No. II |

by Stanley A. Schainker

# USING METAPHORS TO FACILITATE ORGANIZATIONAL CHANGE

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Explain that a metaphor is "a word or phrase that literally denotes one kind of object or idea but is used in place of another to suggest a likeness or analogy between them." Inform participants that this activity will focus on metaphors, in general, and one specific metaphor in particular — the metaphor of middle grades reform as a nautical journey that serves as the framework of our middle grades Casebook. | |
| 7 | Divide the total group into smaller groups of 5 to 7 people. Ask each group to think about the definition of "metaphor" that you have given them and to identify a minimum of 5 metaphors that are rather commonly used in today's world. | W1-1 |
| 10 | Have a representative from each group share his/her group's list with the total group. | |
| 5 | Tell the participants that metaphors have value in fields such as creative writing, journalism, and advertising because they can:<br>• *make abstract ideas more concrete and understandable,*<br>• *simplify complex ideas, and*<br>• *add drama and excitement to an idea, thus, stimulating others' interest.* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Ask participants to examine the value of metaphors from a leader's perspective — a leader interested in helping others to make a significant organizational change like implementing the middle school concept. Have them work in their small groups to generate lists of advantages for a leader using metaphorical communication. Suggest that they begin by reviewing the reasons why metaphors are used in such fields as creative writing, journalism, and advertising. | W1-2 |
| 10 | Have representatives from the groups share their lists with the total group, making sure that you record their ideas in an easily readable format on newsprint or a chalkboard.<br>(If these advantages do not surface, you may want to add them to the master list:<br>• *Help to clarify and emphasize what is really important.*<br>• *Provide a common language that helps to bind people together.*<br>• *Provide a common frame of reference with which people can quickly get in touch.*<br>• *Lend themselves to visual images that can capture the imagination, facilitate recall, and build commitment.*<br>• *Provide a common framework for collecting and analyzing information.*<br>• *Serve as a vehicle for facilitating the generation of problem solutions.)* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 15 | Ask participants now to read pages 5-9 in the Casebook which describe the organizing metaphor that is used in our materials regarding middle grades reform. Stress that as they read about the metaphor they should be thinking about specific ways that the metaphor could be used in their back-home situations to facilitate planning and implementation activities related to the operationalization of the middle school concept. Suggest that they use the worksheet that has been provided to individually jot down their ideas. | W1-3 |
| 10 | Have the participants share their ideas within their small group and then collectively decide on two or three of the best ideas that could be reported out to the total group. | |
| 10 | Ask a representative from each group to report out the two or three ideas selected to the total group. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Inform the participants that using metaphors potentially also has some disadvantages for leaders. Ask them to consider some ways that a leader could avoid or minimize the potential negative consequences of each disadvantage that you are about to share with them. Then list the following potential disadvantages of a leader using metaphors:<br>• *Sometimes the metaphor will be perceived as too "cutesy" or babyish and this will be used by some to ridicule the change effort itself.*<br>• *Sometimes the metaphor carries negative baggage with it or it has negative connotations which cause some to resist the change effort that it has been used to symbolize.*<br>• *Sometimes the metaphor oversimplifies the idea that it is being used to convey and, therefore, helps to distort some of the perceptions that others have of the change effort.*<br>• *Sometimes people become so preoccupied with and committed to the metaphor that they lose sight of the actual change effort that is being pursued.* | |
| 8 | Ask for individual volunteers to suggest some actions that leaders might take to avoid or to minimize the negative consequences of the previously mentioned disadvantages. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 2<br><br>(90 minutes) | Conclude the activity by emphasizing the real value that metaphors can have for leaders committed to making significant organizational changes. Also suggest that they give serious consideration to ways that they can use the Casebook's nautical journey as a helpful metaphor to promote increased understanding and commitment to middle grades reform in their back-home situations. | |

# COMMON METAPHORS

In your group, think about the definition of a metaphor. Identify and write on this worksheet **at least 5 metaphors** commonly used in today's world.

# ADVANTAGES TO USING METAPHORS

In your group, discuss why metaphors are used in different fields. Generate a list of advantages for a leader using metaphorical communication.

ADVANTAGES:

# PLANNING USE OF THE CASEBOOK METAPHOR

Think about the ways that the Casebook metaphor can be used back home to facilitate planning and implementing middle grades reform. Jot down your ideas so you will be ready to share with your small group.

# UNDERSTANDING IMPORTANT ELEMENTS OF THE PROCESS OF ORGANIZATIONAL CHANGE

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Explain that a metaphor is "a word or phrase that literally denotes one kind of object or idea but is used in place of another to suggest a likeness or analogy between them." | |
| 7 | Have the participants read pages 5-9 in the Casebook which describe a central metaphor that is used to convey the important elements of the process of middle grades reform. | |
| 2 | Divide the total group into six different sub-groups, each having approximately the same number of members. Assign each of these new groups one of the following elements of the central metaphor used in the Casebook — a nautical journey.<br>• *getting launched*<br>• *establishing a destination*<br>• *supporting the crew*<br>• *navigating the voyage*<br>• *arriving at ports of call*<br>• *recognizing that you are not alone at sea* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 30 | Ask each group to create an original song, poem, skit, rap, or story that will communicate the essence of its assigned metaphor element tot the total group. Stress that each creation must take no more than 5 minutes to present. | |
| 30 | Have each group present its creation to the entire group. | |
| 10 | Have each group use the worksheet that has been provided to list important ideas related to each of the six metaphor elements that its members feel are the most important to remember as they undertake the implementation of the middle school concept. | W2-1 |
| 5 | Ask representatives of the six groups to share one idea related to each metaphor element with the total group. | |
| 5 | Conclude by having each individual identify one important idea about school reform that he/she either learned or had reinforced by participating in this activity. | |
| (90 minutes) | | |

# METAPHOR ELEMENTS

List some important ideas related to each of the 6 metaphor elements that your group feels are the most important to remember as the middle school concept is implemented.

Getting Launched:

Establishing a Destination:

Supporting the Crew:

Navigating:

Ports of Call:

Not Alone at Sea:

# CREATING ALTERNATE METAPHORS FOR THE IMPORTANT ELEMENTS OF ORGANIZATIONAL CHANGE

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Explain that a metaphor is "a word or phrase that literally denotes one kind of object or idea but is used in place of another to suggest a likeness or analogy between them." | |
| 7 | Have the participants read pages 5-9 in the Casebook which describe a central metaphor that is used to convey the important elements of the process of middle school reform. | |
| 2 | Divide the total group into smaller groups, each having three members. Assign each of these triads one of the following six elements of the central metaphor used in the Casebook:<br>• *getting launched*<br>• *establishing a destination*<br>• *supporting the crew*<br>• *navigating the voyage*<br>• *arriving at ports of call*<br>• *recognizing that you are not alone at sea* | W3-1 |
| 10 | Have each triad develop, at least, two other metaphors that could be used to capture the essence of its assigned element. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 20 | Have someone from each triad report the following to the total group:<br>• *its assigned element*<br>• *its alternative metaphors*<br>• *its rationale for selecting its new metaphors and how each captures the essence of its assigned element* | |
| 20 | Combine triads to form new groups of six participants. Explain that now that they have heard some other possible metaphors for the individual elements, you would like them as groups to generate an alternate central metaphor that might be substituted for the nautical journey one used in the Casebook. Emphasize that whatever new central metaphor they devise must lend itself to capturing the essence of the six elements that previously have been highlighted. | W3-2 |
| 20 | Have someone from each small group of six share his/her group's alternate central metaphor and explain how it accommodates the six original elements. | |
| 5 | Ask participants to individually reflect on what they learned from this activity and how that learning might help facilitate middle school reform in their back-home situations. | |
| 5 | Conclude by asking for some volunteers to share their individual reflections with the total group. | |
| (90 minutes) | | |

# ALTERNATIVE METAPHORS

In small groups, think about at least two other metaphors that could be used to capture your assigned element. Be prepared to share with the total group:

- the alternative metaphors
- rationale for their selection
- how each captures the essence of the assigned metaphor

ASSIGNED ELEMENT:

# NEW CENTRAL METAPHOR

In combined groups, generate an alternative central metaphor that might be substituted for the nautical journey. Be sure that the new central metaphor captures the six elements previously discussed.

# IDENTIFYING AND TESTING ASSUMPTIONS REGARDING ORGANIZATIONAL CHANGE

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Explain that any time people are involved in an organizational change effort such as implementing a middle school concept, they make a number of important decisions on the basis of assumptions that may or may not prove valid. Stress that experience has shown that many such efforts are undermined or even destroyed because the assumptions made by those in leadership positions are inaccurate. | |
| 2 | Emphasize that this activity in which they are about to participate has been designed to allow them to identify some important assumptions that were made in one attempt to operationalize the middle school concept. Also stress that the activity will help them think about ways that those assumptions could be tested to determine their validity prior to making decisions on which they were based. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 15 | Instruct the participants to read the section of the Casebook entitled "A School in Transition - Crystal Middle School". Explain that as they read this case (pages 11-18) they should circle the phrases or sentences that they think convey assumptions that the case author has made — assumptions that may or may not be true but that have served as a basis for subsequent decisions related to the organizational process. Stress that they should identify a minimum of 20 assumptions within the case. | |
| 10 | Have the participants go back over their circled assumptions and select 5 that they feel are the most significant — assumptions that would have the most negative impact on the change effort if they were not true. Ask the participants to use the worksheet that has been provided to list those 5 assumptions and to explain why they would have such a negative impact if invalid. | W4-1 |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Have the participants use the same worksheet that they previously used to identify a minimum of two different ways that the validity of each of their 5 selected assumptions could have been tested prior to the leaders of Crystal Middle School moving ahead and making decisions based on them. (It might be necessary here to suggest some examples regarding how an assumption can be tested — checking with others to get their perceptions, taking an intermediate step to see how others react, seeking alternative explanations for a particular response and then examining the relative likelihood that each alternative is correct given the situation, collecting observational data to substantiate or invalidate an anticipated outcome, etc.) | W4-1<br>W4-2 |
| 10 | Divide the total group into groups of 6 to 8 people and have participants share their identified assumptions and ways of testing them. | |
| 10 | Instruct the participants to use another worksheet that has been provided to individually reflect on their respective back-home situations and to identify a minimum of 10 major assumptions that they feel have been made in relation to their own middle grades implementation efforts that may not be true and that need to be tested. | W4-3 |
| 10 | Sub-divide each of the small groups into two sub-groups and have each individual share his/her identified assumptions with the other members of the sub-group. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Have individuals select two assumptions that they feel are the most crucial to their own situations, share them within their sub-groups and then discuss some ways that each assumption could be tested to determine its validity. | |
| 10 | Engage the total group in a discussion regarding what has been learned from this activity that has relevance for their back-home attempts to implement the middle school concept. | |
| (90 minutes) | | |

# ASSUMPTIONS:
## CRYSTAL MIDDLE SCHOOL

List five (5) assumptions in this case that you feel are the most significant. (They would have the greatest <u>negative</u> impact on this change effort if they were not true) and explain why each would have a negative impact if they turned out to be invalid.

1.

2.

3.

4.

5.

# TESTING THE VALIDITY OF THE ASSUMPTIONS

What are at least two (2) different ways that the validity of these assumptions could have been tested PRIOR to the leaders of Crystal Middle School making decisions based on them?

# BACK-HOME ASSUMPTIONS

Think about your own back-home situation. List a minimum of ten (10) major assumptions that you feel have been made in relation to your own middle school implementation effort that may <u>not</u> be true and need to be tested.

# ANTICIPATING AND DEALING WITH RESISTANCE TO MIDDLE GRADES REFORM

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 2 | Explain that a major premise found within the literature pertaining to organizational change is that the more significant the change, the more likely the resistance. | |
| 2 | Emphasize that the selections in our middle grades reform Casebook all relate to various types of organizational change efforts — changes associated with operationalizing the middle school concept. | |
| 10 | Refer the participants to "A School in Transition - Crystal Middle School" on pages 11-18. Have them read the case paying particular attention to how various groups resisted the transition. | |
| 5 | Divide the total group into smaller discussion groups of 5 to 7 individuals. Have the small groups discuss the issue of resistance as it applies to this case. | |
| 10 | Ask representatives from the discussion groups to share their groups' conclusions regarding resistance in this case. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Explain that, for whatever reason, there is little evidence of any real resistance in the Crystal Middle School case. Emphasize that in this particular activity we are going to present a "worst case scenario" and pretend that the case author's account of the situation has not acknowledged the resistance that occurred at Crystal in response to the attempt to change the school. | |
| 15 | Ask the members of each group to assign themselves one of the following five roles:<br>• *building administrators*<br>• *department heads*<br>• *teachers*<br>• *parents*<br>• *students*<br>Then have the participants review the description of what happened at Crystal and answer the following questions:<br>1) *At what points in the case might my assigned role group have shown some resistance to what was happening?*<br>2) *Why would my assigned role group have shown some resistance at those points in the case?*<br>Suggest that the participants use the worksheet provided to record their answers to these two questions. | W5-1 |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 15 | Have all participants assigned to the same role group work together and share their answers to the two questions. Also ask them to select two examples of their assigned role group's resistance and suggest a specific strategy that could be implemented that would eliminate or minimize that resistance. Emphasize that these strategies should be concrete, specific, and doable — not just "get the involved", but how they should be involved, when, and with what issue. Suggest that the participants use the worksheet that has been provided to record some notes from this discussion. | W5-2 |
| 10 | Ask the participants to return to their original groups and take turns briefing each other on the two examples of resistance selected for emphasis within their role groups that have been devised to eliminate or minimize that resistance. | |
| 5 | Have individuals reflect on their back-home situations and identify how and why various groups within their schools might be showing some resistance to operationalizing the middle school concept. | |
| 10 | Ask everyone to find a partner, share their identified examples of resistance, and collaboratively think of some ways that this back-home resistance could be eliminated or minimized. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5<br><br>(90 minutes) | Summarize by stating that in most cases involving the implementation of the middle school concept there will be serious resistance. Stress that ultimately the success or failure of such an effort will depend on how well that resistance is handled. | |

# Resistance to Change

Review the descriptions of what happened at Crystal Middle School.

At what point in the case might my assigned role group have shown some resistance to what was happening?

Why would my assigned group have shown some resistance at those points in the case?

## Reducing Resistance

Select two (2) examples of your assigned role group's resistance. Then suggest a specific strategy that could be implemented that would eliminate or minimize the resistance associated with each example. Strategies should be concrete, specific and do-able.

Area of resistance:

Strategy to eliminate/minimize resistance:

Area of resistance:

Strategy to eliminate/minimize resistance:

# ANTICIPATING AND DEALING WITH RESISTANCE

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Explain that whenever an attempt is made to engage in some type of middle grades reform there is a good chance that the attempt will be met with some resistance. | |
| 1 | Stress that it is this resistance that will be the focus of this particular activity. | |
| 3 | Divide the total participant group into smaller groups of 3 to 5 people, making sure that there are an even number of smaller groups when you have completed the task. | |
| 1 | Assign pairs of groups to work together, designating one of the groups in each pair as "A" and the other as "B". | |
| 1 | Explain that a "potential point of resistance" is any event or part of the change process that could cause people to react negatively and to resist attempts to alter the *status quo*. | |
| 1 | Suggest that one factor that is extremely crucial to the success of any middle grades reform effort is the ability of the leadership advocating that reform to anticipate and deal effectively with potential points of resistance. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 12 | Tell the participants to read pages 11-18 in the Casebook, "A School in Transition - Crystal Middle School." Stress that they should read this description critically and identify potential points of resistance that *could have* surfaced at Crystal. | W6-1 |
| 20 | Have the members of each group share their ideas regarding potential points of resistance and select five that they collectively feel could have had the most negative consequences if they had occurred. Also ask the groups to list some of the reasons that those consequences might occur. Ask that someone from each group record those potential points of resistance and the reasons for them having a negative impact on the worksheet provided. | W6-2 |
| 15 | Have the "A" and the "B" groups in each matched pair exchange worksheets. Ask each group to examine what its companion group has identified and then to devise at least one strategy that could be implemented successfully at Crystal that would minimize or eliminate each potential point of resistance mentioned. Stress that the groups be as specific and concrete as possible. | |
| 10 | Have each "A" and "B" matched pair come together and then brief each other on the strategies that have been discussed to deal with the potential points of resistance selected by the other group. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Ask each matched pair of groups to discuss reactions to the strategies that have been proposed, paying particular attention to analyzing why those strategies might or might not be effective. | |
| 5 | Have individuals reflect on the relevance of this activity to their back-home middle school reform efforts and what they personally have learned from participating in this activity. | |
| 5 | Ask that each participant find a partner and share his/her reflections. | |
| 5 | Conclude by asking volunteers to share their reflections with the total group. | |
| (90 minutes) | | |

# Potential Points of Resistance

Read *A School in Transition—Crystal Middle School*. Identify potential points of resistance that *could have* surfaced at the school.

## Negative Impact of Resistance

As a group, examine the five (5) points of resistance that you have identified as having the greatest potential for negative consequences. List the reasons that each might have that impact.

1.

2.

3.

4.

5.

# ASSESSING A STAFF'S READINESS TO EMBARK ON THE JOURNEY OF MIDDLE GRADES REFORM

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Have participants read from page 19 to the middle of page 22 in the Casebook, paying particular attention to the importance of a staff's readiness to embark on the journey of middle school reform. | |
| 5 | Explain that the section of the Casebook that they just read suggests a number of important factors that contribute to a school staff's readiness to engage in middle school reform. Stress that these factors include:<br>• *familiarity with the middle school concept*<br>• *openness to changing the status quo*<br>• *past history of change at school and staff success*<br>• *comfort level of staff to working collegially*<br>• *existing level of staff morale*<br>• *existing level of staff experience and stability*<br>• *willingness to deal with school-wide issues as opposed to individual classroom issues.* | |
| 10 | Divide the total group into smaller groups and have the members of these smaller groups examine the underlying assumptions regarding how each factor might help to contribute to a staff's readiness to undertake a significant middle grades reform. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Ask the groups to identify other factors that might be used to assess a staff's readiness level for change. | W7-1 |
| 10 | Have representatives report on the other factors generated by their groups. Record these ideas on newsprint or a chalkboard so that they can be read. | |
| 5 | Suggest that one way to use this information is for a leader or a leadership team to assess a school staff on the basis of a 5-4-3-2-1 scale for each factor deemed to be important. Suggest that one interpretation of readiness would be a total score of, at least, 4 times the number of factors used. (If 7 factors, then the minimum score needed to be ready would be 28; if 10 factors, then 40, etc.) Stress that this readiness assessment only represents the perceptions of those doing the assessment and, therefore, has a number of limitations. | |
| 15 | Have groups brainstorm as many other ways as they can devise for using this basic approach or some modification to assess a staff's readiness to change that could be used before or during attempts to operationalize the middle school concept. | W7-2 |
| 15 | Ask each group to share its ideas in response to both tasks. | |
| 5 | Have individuals reflect on things that they may have learned by participating in this activity that might be relevant to their back-home situations. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10<br><br>(90 minutes) | Conclude by asking for volunteers to share their "learnings" with the total group. | |

# Factors Contributing to Staff's Readiness for Reform

In small groups, identify factors that might be used to assess a staff's readiness level for change.

# Assessing a Staff's Readiness to Change

Identify ways to assess a staff's readiness to change that could be used before or during attempts to put into operation the middle school concept.

# LAUNCHING MIDDLE GRADES REFORM

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Explain that in this activity we are going to focus on one important element of our metaphor — launching the journey to middle grades reform. | |
| 5 | Have participants read about how middle grades reform efforts were launched in four different schools:<br>• *Crystal* *(p. 12)*<br>• *Burroughs* *(p. 23)*<br>• *Garden* *(p. 25)*<br>• *Taft* *(p. 26)* | |
| 1 | Emphasize that there is no single way to launch successful middle grades reform efforts — that the impetus for reform can originate from many different sources as illustrated by the case materials that they have just read. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Have participants use the worksheet provided to reflect individually on how they personally would feel in their own back-home situations if the impetus for middle grades reform originated with each of the following:<br>• *parents or organized parent group*<br>• *board*<br>• *superintendent*<br>• *district administration (other than superintendent)*<br>• *principal and/or assistant principal*<br>• *small group of teachers (of which they are a part)*<br>• *small group of teachers (of which they are <u>not</u> a part)*<br>• *large group of teachers (of which they are a part)*<br>• *large group of teachers (of which they are <u>not</u> a part)*<br><br>Stress that they are to focus on their personal reaction to each listed source vis-a-vis their own work environment and that they also are to briefly describe their reasons for each reaction. | W8-1 |
| 5 | Ask participants individually to review their worksheet reflections and to write an answer to the following questions:<br>*What contributing factors seem to be important to you feeling positive about the decision to embark on a middle school effort in your back-home situation? Why?* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Have participants read a two page description of "reflective interviewing." Emphasize that this technique is one example of "interactive reflection" and is particularly valuable for helping people to examine their beliefs, values, and assumptions. | W8-2 |
| 5 | Engage in a brief demonstration of reflective interviewing using hypothetical responses to the worksheet with which they have been working as the vehicle for the interview. | |
| 10 | Have participants form pairs and then reflectively interview each other regarding responses on the worksheet. Instruct each pair to spend ten minutes on the interviews or five minutes as the interviewer and five minutes as the interviewee. | |
| 5 | Have each participant individually reflect on any insights that have occurred as the result of the reflective interviews. | |
| 10 | Depending on the total number of people in the room, ask two or three pairs to form small groups and share what they have learned from completing the worksheets and engaging in the reflective interviews. | |
| 10 | Have a representative from each small group summarize what was shared within his/her group for the total group. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Ask members of the total group to collectively identify some important implications for launching a middle grades reform effort that are suggested by this activity. Record the implications on chart paper or a chalkboard so all can see them. | |
| 5 | Have participants read pages 21-24 in the Casebook. | |
| 10 | Distribute another worksheet that lists two questions and have participants reflect on their back-home situations as they individually answer the following questions:<br>1) *If you had the authority in your back-home situation for making some recommendations regarding launching a middle school effort and you knew that these recommendations would be implemented, what would those recommendations be and why would you make them?*<br>2) *Regardless of your role back home, what are some specific actions that <u>you</u> personally can undertake now to make these recommendations become a reality?* | W8-3 |
| 2 | Conclude by emphasizing the importance of launching a middle school reform effort in a way that will be most appropriate to the realities of their back-home situations. Challenge the participants to return home and to do what they can to insure that the launch will be successful. | |
| (90 minutes) | | |

# Origins of Reform Impetus

Think about your own back-home situation. What are some words wthat would best capture your **feelings** if the impetus for middle school reform came from the following individuals or groups.

Parents _____

Board _____

Superintendents _____

District Administration _____

Principal and/or Asst. Principal _____

Small groups of teachers (of which you are a part) _____

Small group of teachers (of which you are **not** a part) _____

Large group of teachers (of which you are a part) _____

Large group of teachers (of which you are **not** a part) _____

# USING REFLECTIVE INTERVIEWING TO PROMOTE LEARNING

## *Background and Rationale*

Reflective interviewing is a communications strategy designed to promote professional reflection and on-the-job learning. Originally introduced as a basic component of the Peer-Assisted Leadership (PAL) program for school principals which was developed at the Far West Laboratory for Educational Research and Development in San Francisco, reflective interviewing has been used in a number of professional development activities to build supportive working relationships and to facilitate learning. Reflective interviewing typically occurs in collegial pairs with both parties alternating the roles of interviewer and interviewee.

The primary purpose of reflective interviewing is to help an individual clarify and better understand his/her assumptions, values, beliefs, and/or actions – and their major consequences. In other words, this process is intended as a vehicle for reflective thinking and learning. As such, the interviewer is responsible for helping his/her colleague examine underlying thoughts and feelings and *not* for making evaluative judgments or giving advice or providing feedback. Both research and experience suggest that people learn best if they are encouraged – and even forced – to analyze their own actions, thoughts, or feelings and to examine how they are perceiving and processing information. It is in the accomplishment of this latter goal that reflective interviewing can make a significant contribution.

## *The Interviewer's Responsibility*

The individual assuming the role of reflective interviewer has the major responsibility for making the process work. It is essential that the interviewer remember that his/her own feelings, thoughts, and perspectives are irrelevant to the successful implementation of the strategy. The focus always must remain on the person being interviewed and his/her feelings, thoughts, and perspectives. The interviewer needs to serve as a facilitator, a clarifier, a prober, and a supporter; not as an evaluator, a monitor, or an advisor. The interviewer's non-judgmental, non-evaluative, non-advice-giving communication allows the person being interviewed to examine his/her thoughts, feelings, and behavior in a psychologically safe environment where personal opinions are respected and soul-searching self-assessments are protected by a covenant of confidentiality.

More specifically, the interviewer should keep four important quidelines in mind when conducting a reflective interview:

1. It is the interviewer's responsibility both to initially establish and to insure a climate of openness and trust in all interactions. Allowing personal biases to

enter into the conversation or reverting to evaluative or advice-giving behavior will undermine the type of climate that is needed to support reflective learning.

2. The interviewer should practice "active listening" to help the interviewee clarify his/her thinking. Answers or explanations that are given can be followed-up with such responses as:
   - asking specific questions to clarify words or statements that are ambiguous and that can be open to a variety of interpretations
   - paraphrasing what has been heard and checking for understanding
   - soliciting concrete examples to illustrate what is being said

3. The interviewer should phrase questions or probes in a neutral, non-judgmental manner both in terms of choice of words and tone of voice. Some examples of this approach include:
   - "What did you mean when you said...?"
   - "Why did you think that was the case?"
   - "Elaborate on that a little more, please?"
   - "Please give me an example of what you are saying."
   - "Anything else that you can add?"

4. The interviewer should never respond to the interviewee's responses with his/her own opinions, suggestions, or interpretations. This guideline should apply even if the interviewer is asked to do so!

## *Questioning Strategies*

During the course of a reflective interview, the interviewer normally will ask three basic types of questions. These are:

1. **Questions that Clarify Events and Actions**

   The responsibility of the interviewer during this type of questioning is to help his/her partner draw to the conscious level the important descriptive factors or elements that contribute in some important ways to the situation under reflection.

   *Examples:*

   - When you first discussed this situation, you mentioned that five key people were involved. Who were they? Can you describe each person's involvement?

- When you first described this situation, you said that it had a significant effect on your staff. Can you discuss what that effect was? Can you describe how it affected key people?

2. **Questions that Clarify the Tone or Feeling Associated with Situations**

   The responsibility of the interviewer during this type of questioning is to bring to the surface any important factors related to the emotional context of the situation, and the partner's reflections on his/her feelings related to the situation.

   *Examples:*

   - During the situation you described, you said that a great deal of conflict occurred. Can you describe your feelings at the time?
   - What type of climate were you trying to create? Can you describe what you did to create that emotional tone?

3. **Questions that Clarify Reasons, Intent, and Consequences**

   The responsibility of the interviewer during this type of questioning is to help his/her partner construct meaning by exploring behaviors and their consequences. By enabling the partner to examine patterns or activity and resulting outcomes, the likelihood is increased that he/she will be in an improved position to determine causality and thus select appropriate alternative behaviors.

   *Examples:*

   - Can you tell me about your reasoning in making the decision to...?
   - What did you think might happen to you...?
   - What behavior did you anticipate might result when you ...?

## *Conclusion*

Many individuals acknowledge the importance of on-the-job learning to their own professional development. Unfortunately, a variety of factors hinder one's ability to get the most from his/her experiences. Reflective interviewing represents one important strategy that can be used to help individuals to better understand themselves and, in the process, strengthen their professional effectiveness. As such, reflective interviewing should be an integral part of the behavioral repertoire of anyone who is committed to self-improvement or collegial support.

Adapted from: Barnett, Bruce G. "Using Reflection as a Professional Growth Activity." Greenfield, W.D. (Ed.) Instructional Leadership: Concepts, Issues Controversies. Newton, MA: Allyn and Bacon, 1987.

## Reflections

Write your answers to the following questions.

1) If you had the authority in your back-home situation for making some recommendations regarding launching a middle school effort and you knew that these recommendations would be implemented, what would those recommendations be and why would you make them?

2) Regardless of your role back home, what are some specific actions that you personally can undertake now to make these recommendations become a reality?

# EXAMINING THE LAUNCHING OF MIDDLE GRADES REFORM

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Explain that this activity will focus on one important element of our metaphor — launching the journey to middle grades reform. | |
| 10 | Have participants read pages 19-26 in the Casebook, and ask them to think about how the reform effort was launched in their particular school as they read that section. | |
| 1 | Emphasize that there is no one magic formula for launching middle grades reform that, when followed, guarantees success. Stress that every launching strategy has advantages and disadvantages — and the potential for contributing to negative organizational consequences down the line. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 15 | Have participants use the worksheet provided to reflect individually on how a middle grades reform effort was launched at their school. Explain that they are to write their answers to a series of questions on their worksheets and to be prepared to share those answers with others. Emphasize that they should divide the time available to them so that they can answer all of the following questions:<br>1) *Who actually initiated the idea to move into a middle grades reform effort?*<br>2) *Why do you think that he/she/they took that action?*<br>3) *How was the idea proposed?*<br>4) *How did you feel when the idea of middle grades reform first surfaced? Why?*<br>5) *How did others feel? Why?*<br>6) *What, if any, problems eventually surfaced because of the idea's originator or how the idea was first proposed? Why?*<br>7) *What, if any, problems were avoided because of the idea's originator or how the idea was first proposed? Why?*<br>8) *If you had the ability to re-launch the middle grades reform effort in your school by starting from scratch, what would you do differently and why?* | W9-1 |
| 5 | Have participants read a two page description of "reflective interviewing." Stress that this technique is one example of "interactive reflection" and is particularly valuable for helping people to examine their beliefs, values and assumptions. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Engage in a brief demonstration of reflective interviewing using hypothetical answers to the same questions that the participants have just answered as the focus of the interview. | |
| 16 | Have participants form pairs and then reflectively interview each other to probe the answers given to the worksheet questions. Instruct each pair to spend sixteen minutes on this task or eight minutes as the interviewer and eight minutes as the interviewee. | |
| 5 | Have each participant individually reflect on any insights that have occurred as the result of the reflective interview. | |
| 10 | Depending on the total number of people in the room, ask two or three pairs to form small groups and share what they have learned from answering the worksheet questions and engaging in the reflective interview. | |
| 10 | Have a representative from each small group summarize what was shared within his/her group for the total group. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Distribute another worksheet to participants and have them individually answer the following questions:<br>• *Given what has happened to date regarding the launching of a middle grades reform effort at your school and everything that has happened since, what specifically do you think needs to happen <u>now</u> and why?*<br>• *Regardless of your role back home, what are some specific actions that <u>you</u> personally can undertake now to make your answer to the previous question happen?* | W9-2 |
| 2 | Conclude by emphasizing the importance of dealing with problems that can be traced back to the launching of a middle school reform effort. Urge the participants to assume responsibility *through their actions* to address problems that are hindering the effective implementation of middle school reform. | |
| (90 minutes) | | |

# GETTING LAUNCHED

You have fifteen (15) minutes to answer all of the questions listed on these 2 pages. Please answer each question briefly and then quickly move on to the next.

Who actually initiated the idea to move into a middle grade reform effort?

Why do you think that he/she/they took that action?

How was the idea proposed?

How did you feel when the idea of middle grade reform first surfaced? Why?

## GETTING LAUNCHED
continued

How did others feel? Why?

What, if any, problems eventually surfaced because of the idea's originator or how the idea was first proposed? Why?

Why, if any, problems were avoided because of the idea's originator or how the idea was first proposed? Why?

If you had the ability to launch the middle grade reform effort in your school by starting from scratch, what would you do differently and why?

# Next Steps Back Home

Think about your own back-home situation. Answer the following questions.

Given what has happened to date regarding the launching of a middle grade reform effort at your school and everything that has happened since, what specifically do you think needs to happen now and why?

Regardless of your role back home, what are some specific actions that you personally can undertake now to make your answer to the previous question happen?

# ESTABLISHING A DESTINATION

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Explain that one important element of any middle grades reform effort is to create a shared vision regarding what the middle school actually will be — in terms of our metaphor, it is essential for the captain and the crew to arrive at an agreement regarding the ultimate destination of their impending journey. | |
| 2 | Stress that no two middle schools will look *exactly* alike and that each school staff must create its own vision or destination. Emphasize that just as there are a variety of possible destinations for a school staff committed to journeying to the "Land of Middle Schools", there also are many different ways for establishing a middle school destination. Explain that this activity will focus on strategies that can be utilized in a school to create a shared vision for reform or an agreed upon destination for the middle grades journey. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Have participants read pages 27-36 in the Casebook. Ask participants as they read to focus on the specific strategies that were used to establish the destinations of the reform efforts undertaken at:<br>• *Manzanita* *(pp. 29-32)*<br>• *Alexander* *(pp. 33-34)*<br>• *Forest* *(p. 35)*<br>• *Jackson* *(p. 36)* | W10-1 |
| 10 | Form working groups of five to seven people. Ask the members of each group to list the specific strategies used in the four schools just highlighted to establish the destinations of their middle school journeys. Then have each group generate a minimum of another six strategies for establishing a common agreement regarding a vision for reform that participants either have experienced or could envision. Ask each group to give a different letter designation to each alternative strategy that it identified. | W10-2 |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 15 | Distribute the worksheet that has been provided and explain that it contains a continuum from "Probably *Will Work* in My School's Current Context" to "Probably *Will Not Work* in My School's Current Context." Ask participants to reflect on their back-home situations — if they work in a school in which the staff already has reached consensus regarding a vision of middle grades reform, they should pretend as if it had not happened — and determine the relative appropriateness of each strategy generated by their group. Stress that this task should be done individually and that the letters designating *all* of the alternatives should be arranged along the continuum as they feel appropriate, given their assessments of the current contexts of their respective schools. Also, alert the participants that they will be expected to explain their reasoning for locating the alternatives along the continuum in the manner that they have. | W10-3 |
| 15 | Re-form participants into groups of three. (For the purposes of time efficiency, two person teams are preferable to four person teams if the total number of persons is not easily divisible by three.) Have each individual share his/her continuum decisions and give a rationale for each placement. Instruct the other team members to ask questions where appropriate in order to understand each individual's reasoning for determining the relative "workability" of each strategy within his/her school. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Combine sets of two teams into new discussion groups. have these groups discuss the conclusions that can be drawn from this activity and the ways that different people reacted to it. Ask the discussion groups to pay particular attention to the following question:<br>*"What seem to be some of the key factors that can be used to assess whether or not a strategy for establishing a destination for a middle grades reform effort will work in a school?"* | |
| 15 | Have a representative from each discussion group share his/her group's conclusions with the total group. | |
| 5 | If the following factors have not surfaced, suggest that other factors they might want to consider include:<br>• *existing level of trust between principal and staff*<br>• *existing level of trust within the faculty*<br>• *staff stability/turnover*<br>• *past history regarding how important school decision have been made*<br>• *past history of staff reactions to other change initiatives*<br>• *relative commitment of key staff members to the change*<br>• *past history of administration/teacher relations in district*<br>• *existing pressure for change from Board/District officials* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Have participants use the worksheet provided to individually answer whichever question they feel is the most appropriate from the following:<br>• *If you work in a school whose staff already has agreed on a destination for its middle school journey, what are some specific things that you can do to help others to keep that destination clearly in focus?*<br>• *If you work in a school whose staff has not previously agreed on destination for its middle school journey, what are some specific things that you can do to help others reach consensus for and build commitment to a common destination?* | W10-4 . |
| 2 | Conclude by again emphasizing the importance of a school staff developing a shared vision regarding where it wants to go with its middle school reform effort. Urge the participants to take some personal action back home to see that this shared vision actually is in place. | |
| (90 minutes) | | |

# Establishing a Destination

List the specific strategies used by the four (4) schools to establish the destinations of their middle school journeys.

A-Manzanita Middle School

B-Alexander Middle School

C-Forest District

D-Jackson Intermediate School

# Strategies for Establishing a Common Vision for Reform.

Generate a minimum of six additional strategies for establishing a common agreement on a vision for reform.

E- _____

F- _____

G- _____

H- _____

I- _____

J- _____

# Strategy "Workability" Back Home

Below you will find a continuum regarding the feasibility of implementing various strategies that either were used or could be used to reached a shared vision for reform.

Think of your own back-home situations and your perceptions of that reality. Next, determine how appropriate each of the strategies (A-J) would be for that situation. Place the letter representing each strategy along the continuum based on your judgement. When you are through, you will have placed all 10 letters on the continuum.

Probably will work in my school's current context

Probably will not work in my school's current context

# Next Steps . . .

Answer the question below that best pertains to your own back home situation.

If you work in a school whose staff already has agreed on a destination for its midddle school journey, what are some specific things that you can do to help others to keep that destination clearly in focus?

If you work in a school whose staff has not previously agreed on a destination for its middle school journey, what are some things that you can do to help others reach consensus for and build commitment to a common destination?

# IDENTIFYING SOME BASIC WAYS OF DEVELOPING A SHARED VISION OF THE DESTINATION

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 2 | Explain that both research and experience suggest that it is absolutely essential that a shared vision emerge within any school that eventually becomes successful as a middle school — a shared vision regarding the ultimate destination of the journey of the middle grades reform. | |
| 5 | Have the participants use the worksheet that has been provided to individually list a minimum of ten different words that represent the types of leadership actions that can be taken to build or develop a shared vision within a school for reform. Suggest that they consider such leadership actions as focusing, sharing, discussing, etc. Tell the participants to put these lists aside after they are completed and that we will return to them later in this activity. | W11-1 |
| 5 | Have the participants now read pages 27-28 in the Casebook that speaks to the importance of the staff having a common vision of a school's destination when a middle grades reform journey is begun. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Emphasize that, as with most aspects of school reform, there is no single magic formula that, if followed, will guarantee success in the development of a shared vision. Stress that experience has shown that there are a number of basic leadership actions that can contribute to the development of a shared vision — leadership actions that are fairly commonplace and doable. Note that they are about to review four different examples of the development of a shared vision and that you want them to identify the leadership actions in each that helped to create those shared visions. | |
| 10 | Ask the participants to read the selections in the Casebook pertaining to:<br>• *Manzanita* *(pp. 29-32)*<br>• *Alexander* *(pp. 33-34)*<br>• *Forest* *(p. 35)*<br>• *Jackson* *(p. 36)*<br>Tell them that as they read these descriptions they should use the worksheet that has been provided to list the one-word actions that the respective leaders in these four situations took to help develop a shared vision. | W11-2 |
| 13 | Divide the total group into smaller discussion groups of 4 to 6, have the members of these smaller groups share their individual lists of leadership actions by case, and ask them to explain why they listed the leadership actions that they did. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 12 | Have the discussion groups identify the leadership actions that were used in two or more of the four cases and then write those actions on newsprint and tape it to the wall. | |
| 5 | Review the posted lists — either allowing participants to read the actions or reading them to the participants. | |
| 10 | Refer participants back to the original list of leadership actions that they previously generated at the beginning of the activity and ask them to compare/contrast those actions with the lists of actions that have been drawn from the case examples. Solicit comments, observations, conclusions, etc., from selected volunteers. | |
| 5 | Summarize by suggesting that while there is no one way to develop a shared vision regarding the ultimate destination of a middle grades reform journey, there are some basic generic leadership actions such as<br>• *researching*<br>• *sharing*<br>• *discussing*<br>• *involving*<br>• *proposing*<br>that seem to help. Stress that these actions represent the application of common sense and do not require a great deal of additional skill or outside expertise. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Have individuals reflect on what has happened or what is happening in their back-home situations regarding this issue of establishing a destination or developing a shared vision and to write down some observations regarding how this process could have been or could be strengthened in light of this activity. | W11-3 |
| 5 | Have some volunteers share their reflections with the total group. | |
| (80 minutes) | | |

# Developing a Shared Vision

List a minimum of ten (10) different words that represent the types of actions that can be taken to build or develop a shared vision within a school for reform.

# Leadership Actions for Developing a Shared Vision

For each of the schools named below, list the leadership actions that were used to help develop a shared vision regarding the reform efforts to take place in that school. Restrict your lists to one-word descriptions.

Manzanita Middle School

Alexander Middle School

Forest District

Jackson Intermediate School

# Establishing a Destination Back Home

Reflect on what has happened or is happening at your school regarding the issue of establishing a destination or a shared vision. Write down some observations regarding how this process could have been or could be strengthened.

# IDENTIFYING THE SHARED VALUES AND BELIEFS IN A SCHOOL

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Explain that one crucial element in any middle grades reform effort is the development of a shared vision regarding what the school should or could become — establishing the ultimate destination of the journey (pages 27-28 in the Casebook). Emphasize that this vision will develop to the extent the staff comes to share some basic values and beliefs regarding such areas as:<br>• *the nature of early adolescence*<br>• *the major purposes of middle age education*<br>• *the important content of middle age education*<br>• *the basic responsibilities of teachers* | |
| 2 | Explain that the individual members of any school's staff have a number of values and beliefs regarding these four areas and those values and beliefs primarily are reflected by what they do — not necessarily by what they say. Stress that this idea is best summarized by an adaptation of the common teenage expression "Walk your Talk." — "The way you walk is a true indication of your inner talk!" | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 15 | Ask individual participants to reflect on their own current (or past if not now a classroom teacher) behavior in relation to the following topics:<br>• *classroom rules and consequences*<br>• *grading policies*<br>• *test questions*<br>• *homework assignments*<br>• *instructional strategies*<br>• *feedback on academic performance*<br>• *time allocations in class*<br>• *communication with home*<br>and to write a brief statement that summarizes their behavior for each of the eight topics. Suggest that they use the worksheet that has been provided for this purpose. | W12-1 |
| 15 | Ask the participants to use the same worksheet and to list some value or belief statements that they feel each statement or behaviors suggests. Explain, for example, that the behavior statement, "I always grade on the curve," might reflect the belief that "there always are some students who will exceed my academic expectations and some who will not be able to meet those expectations" and the behavior statement, "I talk to parents when there is a problem," might reflect the belief that "parents only want to hear from us if something is wrong — if they don't hear from a teacher, they assume everything is all right and that their children are doing fine." | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Divide the total group into smaller discussion groups and have these groups share their feelings/reactions to the preceding exercise. | |
| 10 | Have representatives from the discussion groups summarize the feelings/reactions within their respective groups. | |
| 10 | Ask the groups to devise some ways that this type of exercise — or some variation of it — could be used in their back-home situations to help identify the shared values and beliefs that already exist, and how this information could be used to target certain shared values and beliefs that might hinder the middle grades reform journey. | |
| 10 | Ask someone from each group to report out some of the ideas that were discussed in his/her group. | |
| 5 | Conclude by stressing the importance of identifying the values and beliefs that are shared by a school's staff and by emphasizing that these shared values and beliefs significantly can help and/or hurt any attempt to establish a destination for a middle grades reform journey. | |
| (80 minutes) | | |

# Reflection of Values and Beliefs Through Behavior

Write a single sentence that summarizes how you deal (or how you dealt in the past) with each topic identified below. Then review each statement and list some values or beliefs that are suggested by each behavior.

| Topic | Summary of how you deal with (or have dealt with) each topic | Values or beliefs reflected in behavior |
|---|---|---|
| Classroom rules and consequences | | |
| Grading policies | | |
| Test questions | | |
| Homework assignments | | |
| Instructional strategies | | |
| Feedback on academic performance | | |
| Time allocations in class | | |
| Communications with home | | |

# GETTING THE CREW TO "BUY-IN" TO THE JOURNEY

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Have the participants read the section of the Casebook entitled "Achieving Buy-In," on pages 38 and 39. | |
| 2 | Emphasize that while staff involvement usually is seen as the key factor to achieving staff buy-in or commitment to a significant change, the concept often is viewed in extremely simplistic ways. Stress that it is important to look at "involvement" in relation to three basic questions:<br>• *In what specific types of activities should staff members be involved?*<br>• *Exactly how should staff members be involved in those activities?*<br>• *In what different ways can different staff members be involved to accommodate varying levels of readiness, interest, and commitment?* | |
| 5 | Have participants read about the ways that were used to encourage buy-in at:<br>• *Springdale* *(p. 40)*<br>• *Fulton* *(p. 41)*<br>• *Jefferson* *(pp. 42-43)*<br>and to use the worksheet provided to record some notes regarding the answers to the first two questions previously mentioned. | W13-1 |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Divide the total group into smaller discussion groups of no more than 7 people. Have individuals share their answers with other members of their respective groups. | |
| 10 | Ask the participants to use the worksheet provided to individually answer the following questions about a time in their career when they bought-in to a new idea or direction:<br>• *How did you decide to buy-in to a new direction or try a new approach? What criteria had to be met before you felt committed?*<br>• *In what specific types of activities did you want to be involved? In which ones did you not want to be involved? Why?*<br>• *As you think about those activites in which you were involved, how was "involvement" defined for you? Why?* | W13-2 |
| 15 | Have participants share their personal reflections within their respective groups and then come to some conclusions regarding what these answers all mean. Suggest that each group generate 3 to 5 conclusions. | |
| 10 | Ask someone from each group to share his/her group's conclusions with the total group. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 15 | Have each group generate a comprehensive plan for obtaining staff buy-in to a middle grades reform effort that consists of a minimum of ten different but complementary strategies. Suggest that as participants complete this task they review what was done at Springdale, Fulton, and Jefferson as well as their own experience and conclusions. Have each group record its plan on newsprint in a readable form and tape these sheets on the wall so others can see them. | |
| 10 | Ask the participants to mill about the room so they can read all of the posted plans. | |
| 10 | Ask volunteers to think about the ways buy-in was achieved or is being achieved in their back-home situations and compare/contrast those strategies with the ones that have been generated on the wall lists. | |
| 5 | Conclude by stressing how important it is to remember that not all staff members need to be involved in the same activities or to the same degree to achieve their buy-in. | |
| (90 minutes) | | |

# Encouraging "Buy-in"

Different strategies can be used to develop staff commitment to a school reform effort. In the space provided, list the ways that staff "buy-in" was achieved in the three (3) schools.

| School | What activities were used? | How was the staff involved? |
|---|---|---|
| Springdale Middle School | | |
| Fulton Junior High School | | |
| Jefferson Middle School | | |

# "Buying-in" to a New Idea

Think back over your career and identify an experience that you had when you "bought-in" to a new professional idea or direction. Keeping that experience in mind, answer the following questions.

How did you decide to buy in to a new direction or try a new approach? What criteria had to be met before you felt committed?

In what specific types of activities did you want to be involved? In which ones did you not want to be involved? Why?

As you think about those activities in which you were involved, how was "involvement" defined for you? Why?

# TRANING THE CREW TO TAKE COMMAND

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 2 | Have the participants read the first paragraph on page 44 in the Casebook and explain that in this activity we are going to examine some issues that relate to the topics of delegation and shared leadership. | |
| 6 | Ask the participants to quickly read the description regarding how teacher teams were developed at three schools:<br>• *Eastside* *(pp. 45-47)*<br>• *Harrison* *(pp. 48-49)*<br>• *Mayfield* *(pp. 50-51)* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 2 | Explain that the principals at these three schools were fortunate — their decisions and actions did not seem to present any significant leadership dilemmas for them. Emphasize that in many cases the decision to delegate responsibility to others and to really share leadership leads to some interesting problems for the principal. Stress that they are going to consider five different leadership dilemmas that actually have occurred in schools that have implemented interdisciplinary teaching teams as part of their larger middle grades reform efforts. Tell the participants that they are to individually reflect on each of these leadership dilemmas and then use the worksheet that has been provided to indicate how and why they would deal with each situation. | W14-1 |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Provide a quick overview of the five dilemmas that you want them to confront. Explain that they are to assume that they are the principal of a middle school in transition and are not personally committed to interdisciplinary teaming and shared leadership. Stress that they are to answer and provide a rationale for each answer to the following questions:<br>1) *What would you do if 65% of your faculty wanted to move into a full-scale implementation of interdisciplinary teams and 35% (including roughly one-half of your English/LA teachers and one-half of your Science teachers) refused to participate? Why?*<br>2) *What would you do if twelve teachers intensely wanted to fill the six existing team leader vacancies and the most senior, most popular members of this group of applicants were the least respected and qualified from your point of view? Why?*<br>3) *What would you do if the members of two existing teaching teams at the 7th grade level unanimously wanted to implement a new grading policy for their classes that you personally felt was inconsistent with your middle grades philosophy and not very good for the students? Why?*<br>4) *What would you do if there was a dispute over an important team policy matter between members of the teaching team and the team leader who you had hand-picked to encourage her to show initiative and to develop her self-confidence? Why?* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| | 5) *What would you do if after all of the other teaching teams in the school had been arranged through a well-thought out, time consuming self-selection process, the four people who were left to form the last team did not want to work together? Why?* | |
| 25 | Have the participants individually answer all of these questions. | |
| 30 | Divide the total group into smaller discussion groups and have the members of each share and discuss their responses. | |
| 5 | Have the participants reflect on their responses as well as those of their colleagues and to individually devise one sentence that conveys what they think that they have learned from this activity that would have special relevance to their back-home situation. | |
| 15 | Have each individual share his/her sentence with the entire group. | |
| (90 minutes) | | |

# Leadership Dilemmas

Read each of the five (5) leadership dilemmas presented. Then in the space provided indicate **how** you would deal with each if you were the principal of a middle school in transition who is personally committed to the concepts of interdisciplinary teaming and shared leadership. Also briefly describe your **rationale** for each of your answers.

What would you do if 65% of your faculty wanted to move into a full-scale implementation of interdisciplinary teams and 35% (including roughly one-half of your English/LA teachers and one-half of your Science teachers) refused to participate? Why?

What would you do if twelve teachers intensely wanted to fill the six existing team leader vacancies and the most senior, most popular members of this group of applicants were the least respected and qualified from your point of view? Why?

What would you do if the members of two existing teaching teams at the 7th grade level unanimously wanted to implement a new grading policy for their classes that you personally felt was inconsistent with your middle grades philosophy and not very good for the students? Why?

What would you do if there was a dispute over an important team policy matter between members of the teaching team and the team leader you had hand-picked to encourage her to show initiative and develop her self-confidence? Why?

What would you do if after all of the other teaching teams in the school had been arranged through a well-thought out, time consuming self-selection process, the four people who were left to form the last team did not want to work together? Why?

# EMPOWERING THE CREW TO ASSUME SOME LEADERSHIP DURING THE VOYAGE

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Explain that one important factor that contributes to successful middle grades reform is the staff assuming responsibility and providing leadership for the effort. | |
| 6 | Emphasize that "Dreams to Reality: Teacher Empowerment — Sunnyside Middle School" (pages 52-56) illustrates one example of the type of staff empowerment that can facilitate middle school reform. Have the participants read pages 52-56 in the Casebook. | |
| 3 | Divide the total group into smaller task forces of no more than 7 people. Explain that each task force will be responsible for planning a retreat for the 40 teachers and administrators of Let's Pretend Middle School. Stress that the retreat is scheduled to begin at 9:00 a.m. on a Monday and end at 4:00 p.m. on Tuesday, and that all the staff is committed to staying at the retreat center on Monday night. Also, emphasize that the four goals of this retreat are the same as those listed on page 54. Alert each task force that they will have to provide a brief overview (outline of activities, time allocations, and rationale regarding how the activities contribute to accomplishing the stated goals) of its proposed plan to the entire group. | W15-1 |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 45 | Have the task forces work on their retreat plans. | |
| 30 | Have each task force give a brief presentation summarizing its proposed plan that describes:<br>• *major time allocations*<br>• *rationale explaining how the activities will help to achieve the retreat's stated goals.* | |
| 5 | Conclude by having each participant individually reflect on the following:<br>*What did I learn by participating in this activity that might actually help me to contribute to our staff effort to operationalize the middle school concept?* | |
| (90 minutes) | | |

# Planning A Retreat

In your group, plan a staff retreat that will last from 9:00am Monday through 4:00pm Tuesday (including Monday night). Be prepared to share an overview of these 2 things:

Activities/Timeline

Rationale for how activities contribute to 4 stated goals (see page 54).

# KEEPING THE CREW FOCUSED ON THEIR DESTINATION

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Have the participants read pages 57 and 58 in the Casebook which deal with the topic of "Keeping Staff Moving and On Target." | |
| 1 | Refer them back to the following sentence found on page 57:<br>*"Any strategies that administrators regularly use to reinforce and reward staff for work well done can become equally potent as sources of motivation and legitimacy during the change process."* | |
| 1 | Explain that this activity has been designed to focus on a variety of strategies that can be used to reinforce and reward staff efforts that are helping the school make progress regarding operationalizing the middle school concept. | |
| 7 | Ask that everyone read "The Transition to Teaching Teams — Mountain Middle School" (pages 59-62) and identify the strategies that were used to reinforced and reward staff that helped make teaching teams a reality at Mountain. | W16-1 |
| 8 | Divide the total group into smaller discussion groups and have the members of the latter share their perceptions regarding the reinforcement/reward strategies used at Mountain. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Ask representatives to share their group's perceptions with the total group. | |
| 5 | Have the discussion groups answer the following question:<br>*What strategies were used (or are being used) in your back-home situation to reinforce and reward the staff for contributing to the accomplishment of your school's reform destination?* | |
| 10 | Ask representatives to share their group's answers with the total group. | |
| 5 | Have the discussion groups answer the following question:<br>*What other reinforcement/reward strategies can you think of that could be implemented at a school site that would serve to motivate and/or legitimate continued change efforts?* | |
| 10 | Ask representatives to share their groups' answers with the total group. | |
| 5 | Have participants use the worksheet provided to individually answer the following:<br>*Of all the strategies used at Mountain, used back-home, or brought up in this activity, which would personally appeal to you the most? Why? Which would personally appeal to you the least? Why?* | W16-2 |
| 10 | Have volunteers share their answers and rationale with the total group. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5<br><br>(75 minutes) | Conclude by asking for volunteers to share what they feel that they have learned from participating in this activity. | |

# Identifying Strategies that Reinforce and Reward Staff

List the strategies that were used to reinforce and reward staff that helped make teaching teams a reality at Mountain Middle School.

# Evaluation of Strategies

Think back over all of the strategies that were used to motivate or legitimate continued change efforts at Mountain Middle School, in your own back-home situations, or that have been identified as the result of this activity.

Which strategy or strategies personally appeal to you the most? Why?

Which strategy or strategies personally appeal to you the least? Why?

# STAYING ON COURSE — MONITORING THE SHIP'S PROGRESS AND MAKING COURSE CORRECTIONS

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 4 | Have the participants read pages 63-66 in the Casebook which address the process of navigating during the voyage toward middle grades reform. | |
| 1 | Explain that in this activity we plan to focus on the organizational structures that can be used to systematically collect and analyze information regarding the progress of a middle grades reform effort — structures that can facilitate changing or modifying directions when necessary. | |
| 10 | Have the participants individually read the descriptions of:<br>• *Grandview* *(pp. 67-68)*<br>• *Saloma* *(pp. 69-70)*<br>• *Miller* *(pp. 71-72)*<br>• *Glenridge* *(p. 73)*<br>and to list all of the organizational structures that were used in these four schools to collect and analyze information related to their reform efforts. | W17-1 |
| 5 | Divide the total group into smaller ones and have each list the organizational structures identified in the four cases assigned. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Ask the members of each group to collectively identify other organizational structures that have been used in their schools for facilitating data collection and analysis and making "course corrections". | |
| 5 | Have each group examine both lists (one based on the descriptions in the Casebook and the other based on their collective experience) and select five different structures on which to focus. | |
| 10 | Have each group discuss and identify some of the major advantages and disadvantages of relying on each of the five organizational structures that is selected. | W17-2 |
| 10 | Ask representatives to report on each group's structures and analysis. | |
| 4 | Have each participant individually reflect on the following questions:<br>*Which of all the organizational structures that you have heard about today best lend themselves to making course corrections? Why?* | W17-3 |
| 10 | Have participants return to their discussion groups, share their reflections, and answer the following:<br>*What factors need to be present in order to insure that a particular structure will lend itself to making course corrections during a middle school reform effort? Why?* | W17-4 |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Ask someone from each group to share his/her group's response to the last two questions with the total group. | |
| 1 | Conclude by emphasizing the importance of systematically collecting and analyzing information about the progress of the voyage and then making course corrections if needed. Stress that unless this occurs in a planned, formal way it is highly unlikely that a school will safely reach its intended destination. | |
| (75 minutes) | | |

# Identifying Structures for Collecting and Analyzing Information

List all of the organizational structures that were used in these schools to collect and analyze information related to their reform efforts.

Grandview: _____

Saloma: _____

Miller: _____

Glenridge: _____

# Advantages and Disadvantages of Some Organizational Structures

Select five (5) different structures for gathering data, analyzing and making "course corrections." Discuss and identify some of the major advantages and disadvantages of relying on them.

1. _____

Advantages: _____

_____

_____

_____

Disadvantages: _____

_____

_____

_____

2. _____

Advantages: _____

_____

_____

_____

Disadvantages: _____

_____

_____

_____

3. _____

Advantages: _____

Disadvantages: _____

4. _____

Advantages: _____

Disadvantages: _____

5. _____

Advantages: _____

Disadvantages: _____

## Reflect upon . . .

Which of all the organizational structures that you have heard about today best lend themselves to making course corrections? Why?

# Factors Essential for Making Course Corrections

What factors need to be present in order to ensure that a particular structure will lend itself to making course corrections during a middle grades reform effort? Why?

# STAYING ON COURSE — DEALING SUCCESSFULLY WITH UNANTICIPATED PROBLEMS

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Emphasize the famous John F. Kennedy observation that the Chinese character for the word "crisis" is composed of two symbols — one for "danger" and one for "opportunity." Stress how important it is to be alert to unanticipated problems or crises that surface as a school staff tries to implement the middle school concept — and to deal with them successfully. Explain that in this activity we are going to examine some examples of how people dealt with unanticipated problems during middle grades reform efforts and what we can learn from those experiences. | |
| 5 | Have the participants read about the problems that arose at:<br>• *Johnson* *(pp. 75-76)*<br>• *Star Valley* *(p. 77)*<br>• *Manzanita* *(p. 78)*<br>and how those problems turned out to be opportunities for strengthening the middle grades reform efforts at those schools. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Divide the total group into smaller groups and have them discuss what happened at the three schools in question and the positive consequences that resulted from those problems surfacing. | |
| 2 | Stress how important it is to be flexible when trying to accomplish something as significant as middle grades reform and how crucial it is to adjust even the best thought-out plan when it is clear that it is not working or when new developments suggest that it no longer makes sense. | |
| 5 | Ask individuals to identify professional experiences they have had in which unanticipated problems developed and the attempts to deal with those problems significantly improved the situation. Ask participants to jot down some notes regarding these experiences. | W18-1 |
| 15 | Have the participants return to their groups and share their reflections regarding unanticipated problems and their impact. | |
| 10 | Ask each group to identify multiple answers to the following question:<br>*What would you have to see, hear, experience, or feel to make you conclude that you need to deviate from and adjust your plan rather than stick to it?* | |
| 15 | Have a representative from each group read his/her group's list of answers to everyone. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10<br><br>(75 minutes) | Conclude by leading a total group discussion on the importance of being flexible, and how that flexibility must not become an end in itself but rather serve as a means towards your ultimate destination. | |

# Dealing with Unanticipated Problems

Think back over your career and identify some professional experiences that you had where unanticipated problems developed and the subsequent attempts to deal with those problems significantly improved the situation.

In the space below write some notes regarding what happened during these experiences.

# RECHARTING THE SHIP'S COURSE WHILE AT SEA

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Divide the total group into consultant teams of 5 to 7 people. | |
| 2 | Explain that the participants are to pretend that they are members of a team of consultants that has been hired to make a three-hour presentation to the faculty of a middle school in transition. Emphasize that this particular faculty takes great pride in the fact that it has developed a detailed, comprehensive implementation plan that contains specific timelines, clear assignments of responsibility, and well-conceived activities designed to totally convert a traditional junior high into a model middle school within a three year period. Stress that they are to assume that all of the members of their consultant team are philosophically committed to the ideas found on pages 79-84 of the Casebook and feel a strong professional obligation to forcefully communicate those ideas to the faculty that they have been hired to help. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 2 | Explain that their task is to devise a three-hour presentation to the faculty that somehow communicates the key ideas expressed in pages 79-84 of the Casebook. Stress that they will have approximately 35 minutes to plan an outline of that presentation — an outline that will address the following:<br>• *the key points that will be highlighted and why those points have been selected*<br>• *how those points will be communicated and why those strategies were selected*<br>• *how the key points will be sequenced and the reasons for that sequence*<br>• *how much time within the three hour presentation will be allocated to each point and the reasons for those time allocations* | W19-1 |
| 35 | Have the consultant teams complete their assigned task. | |
| 30 | Have a representative from each team provide an overview of his/her group's presentation being sure that all four issues listed above are covered. | |
| 5 | Ask the participants to use the worksheet that has been provided to individually reflect on the following question:<br>*If you were a member of the faculty that prided itself on its three year plan, which of the presentations that you just heard outlined would have the greatest impact on you in terms of getting you to think along the lines expressed on pages 79-84? Why?* | W19-2 |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Ask for some volunteers to share their reflections with the total group. | |
| 10 | Conclude by engaging the total group in a discussion regarding the importance of monitoring the progress of the voyage of middle grades reform and recharting the ship's course during the actual voyage, when it makes sense. | |
| (90 minutes) | | |

# Outline of a Presentation

In your consultant team, plan a 3-hour presentation that communicates the key ideas on pages 79-84. Develop an outline that covers the following:

the key points that will be highlighted and why those points have been selected

how those points will be communicated and why those strategies were selected .

how the key points will be sequenced and the reasons for that sequence

how much time within the three hour presentation will be allocated to each point and the reasons for those time allocations

# Reflections

Reflect back on the various presentations that you have heard and then answer the following:

If you were a member of the faculty that prided itself on its three year plan, which of the presentations that you have just heard outlined would have the greatest impact on you in terms of getting you to think along the lines expressed on pages 79-84. Why?

# MINIMIZING THE CHANCES OF GETTING LOST OUT AT SEA

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Have the participants read pages 93-94 in the Casebook for background. | |
| 1 | Emphasize the importance of finding and using resources as you undertake the significant voyage of middle grades reform. Indicate that the more you can tap into these resources, the less likely you are to lose sight of your ultimate destination and to get lost during the journey. | |
| 2 | Divide the total group into quarters, thus forming four groups. Explain that often there is a great deal of accumulated knowledge within any group of individuals that remains untapped because there is no systematic way to collect it. Stress that they are going to engage in an activity to help collect information regarding resources that might be useful as they undertake a middle grades reform effort. | |
| 2 | Tape sheets of newsprint to the wall of the room in four areas. In each location write one of the following four headings:<br>• *Organizations that might help*<br>• *People who might help*<br>• *Processes that might help*<br>• *Written materials that might help* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 3 | Ask each of the four groups of participants to stand in front of one of the charts, give someone in each group a marker, and explain that as a group they will have five minutes to record as many resources as they can that fit into their assigned category. Stress that at the end of that time they will move clock-wise around the room to the next chart, quickly review what has been written on it and then repeat the recording process. Tell them that this process will be repeated two other times so they will have an opportunity to work on all four charts. | |
| 5 | Suggest some examples for each category to "prime the pump" and stimulate their thinking:<br>• ***Organizations:*** *California League of Middle Schools or the National Association of Secondary School Principals*<br>• ***People:*** *Joe Bondi or John Wiles or "Tony Cox," the middle school principal in a neighboring district*<br>• ***Process:*** *Program Quality Review (PQR) or attending County Office middle grades workshops*<br>• ***Written Materials:*** *Caught in the Middle or The Essential Middle School* | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 29 | Have the four teams complete the idea generation process according to the following time schedule:<br>***First Segment:*** *5 minutes to record ideas*<br>***Second Segment:*** *3 minutes to review; 5 minutes to record ideas*<br>***Third Segment:*** *4 minutes to review; 4 minutes to record ideas*<br>***Fourth Segment:*** *5 minutes to review; 3 minutes to record ideas* | |
| 10 | Ask all the participants to mill around the room so they can review all of the charts. | |
| 15 | Subdivide each of the existing groups in half, forming eight smaller discussion groups. Ask each of these groups to answer the following questions:<br>• *If you wanted to identify other resources that fall within these categories and already have exhausted your staff's knowledge of these areas, what are some other things you could do to add to these lists?*<br>• *What are some ways that you could increase the likelihood that some of the resources on these lists could be helpful to you when you most needed help?* | W20-1 |
| 15 | Ask someone from each of the eight groups to report his/her group's answers. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5<br><br>(90 minutes) | Conclude by asking for volunteers to suggest other ideas for systematically collecting information about possible resources that might be helpful back-home as they undertake the voyage to middle school reform. | |

# Identifying Resources

In your small discussion group, answer the following questions.

If you wanted to identify other resources that fall within these catgories and already have exhausted your staff's knowledge of these areas, what are some other things you could do to add to these lists?

What are some ways that you could increase the likelihood that some of the resources on these lists could be helpful to you when you most needed help?

# LEARNING ABOUT THE VOYAGE OF MIDDLE SCHOOL REFORM FROM ANOTHER SHIP'S LOG - I

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 5 | Have the participants read pages 103-106 of the Casebook that describes the attempt at reform at Sands Middle School. | |
| 35 | Have each participant use the worksheets provided to individually answer the following questions:<br>• *What specifically happened at Sands that illustrates the various elements of the central metaphor used in the Casebook:*<br>  • *getting launched*<br>  • *establishing a destination*<br>  • *supporting the crew*<br>  • *navigating the journey*<br>  • *arriving at various ports of call*<br>  • *recognizing that you are not alone at sea*<br>• *In what ways is your back-home situation similar to Sands? How is it different?*<br>• *What actions did the principal of Sands take that you particularly liked or thought was effective? Why?*<br>• *What actions did the principal at Sands take that you felt uncomfortable with or did not like? Why?*<br>• *If you were the principal at Sands, what exactly would you have handled differently and how?* | W21-1<br>W21-2 |
| 35 | Have the participants form trios and systematically share and discuss their answers to the assigned questions. | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Ask for volunteers to share any comments or observations that they would like to make with the total group. | |
| 5 | Conclude by having the participants individually reflect on the answer to the following question:<br>*What did I learn from participating in this activity that I can use to increase the likelihood that our middle school reform back-home will be successful?* | |
| (90 minutes) | | |

# Analyzing One School's Journey

What specifically happened at Sands Middle School that illustrates each of the basic elements of the central metaphor used in the casebook?

Getting Launched _____

Establishing a Destination _____

Supporting the Crew _____

Navigating the Journey _____

Arriving at Various Ports of Call _____

Recognizing That You're Not Alone at Sea _____

# Reflection on Sands Middle School

Answer the following questions in the space provided.

In what ways is your back-home situation similar to Sands? How is it different?

What actions did the principal of Sands take that you particularly liked or thought were effective? Why?

What actions did the principal at Sands take that you felt uncomfortable with or did not like? Why?

If you were the principal at Sands what exactly would you have handled differently and how?

# LEARNING ABOUT THE VOYAGE OF MIDDLE SCHOOL REFORM FROM ANOTHER SHIP'S LOG - II

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 10 | Have the participants read pages 107-114 in the Casebook which describes the implementation of a middle school organization within a K-8 school. Ask them to pay particular attention to the problems that arose due to the reform effort. Suggest that they focus on the problems related to:<br>• *teacher association/Board negotiations*<br>• *inability or unwillingness of some staff to meet new expectations*<br>• *linkages with the staffs and programs at other grade levels*<br>• *resistance from the existing informal power structure*<br>• *staff exuberance and the tendency to try to do too much too quickly*<br>• *growing involvement and power of parents in educational matters* | |
| 9 | Ask the participants if they had any experience with the types of problems that surfaced at the school highlighted in the reading — problems that hindered their own middle grades reform efforts. Ask that volunteers share their experiences with the total group. (Try to get, at least, one example to reinforce the relevance of each of the six types of problems.) | |

| TIME | TRAINING SEQUENCE | MATERIALS AND EQUIPMENT |
|---|---|---|
| 1 | Emphasize that these six problems frequently arise as schools attempt to operationalize the middle school concept. | |
| 20 | Divide the total group into smaller groups and have them each suggest some specific things that could have been done in Drake School (pp. 113-120) to minimize the overall negative impact of each of those six problems. | W22-1 |
| 20 | Have representatives from the various groups summarize their suggestions for minimizing the negative impact of each of the six identified problems. | |
| 20 | Arrange the participants in pairs. Have each describe a problem that has surfaced as his/her school has undertaken a middle grades reform effort and then collaboratively attempt to identify two or three ways that the negative impact of each problem could be minimized. | |
| 10 | Have each participant think about what he/she specifically could do back-home to promote the ideas that have just been discussed regarding ways to minimize the negative impact of the identified problem. Then have each set of participants share their thoughts with each other. | |
| (90 minutes) | | |

# Minimizing the Negative Impact

In small groups, identify specific things that could have been done at Drake School to minimize the overall negative impact of the problems that arose?

Teacher association/Board negotiations

Inability or unwillingness of some staff to meet new expectations.

Linkages with the staffs and programs at other grade levels.

Resistance from the existing informal power structure.

| |
|---|
| Staff exuberance and the tendancy to try to do too much too quickly. |
| |
| |
| |
| Growing involvement and power of parents in educational matters. |
| |
| |
| |
| |

# RESOURCES FOR MIDDLE GRADES

## STATE AND NATIONAL REFORM DOCUMENTS

Caught in the Middle: Educational Reform for Young Adolescents in California Public Schools. Bureau of Publications, California State Department of Education, P.O. Box 271, Sacramento, CA 95802-0271. Copyright 1987. Cost: $5.00.

Quality Criteria for Middle Grades: Planning, Implementing, Self-Study, and Program Quality Review. Bureau of Publications, California State Department of Education, P.O. Box 271, Sacramento, CA 95802-0271. Copyright 1989. Cost: $4.50.

Glossary of Middle Grade Education Reform Terms. California State Department of Education, Office of Middle Grades Support Services, 721 Capitol Mall, Sacramento, CA 95814.

Turning Points: Preparing American Youth for the 21st Century. Carnegie Council on Adolescent Development, 11 Dupont Circle, N.W., Washington, D.C. 20036. Copyright 1989. Cost: $9.95.

## CALIFORNIA LEAGUE OF MIDDLE SCHOOLS PUBLICATIONS

The California League of Middle Schools has published the following practioner's monographs. The price of each monograph in the series is **$4.25 per copy**, which includes California sales tax, shipping, and handling.

1. Scheduling the Middle Level School: Philosophy Into Practice
2. Equal Access to Education: Alternatives to Tracking and Ability Grouping
3. Instructional Practices for Middle-level Students: Developing Self-Directed Learners
4. Supporting Middle Level Students Through Counseling and Teacher Advisor Program
5. Cocurricular Activities for Middle Level Schools
6. Interdisciplinary Curriculum in the Middle Level School
7. Interdisciplinary Team Organization in the Middle Level School
8. Exploratory and Elective Courses in the Middle Level School
9. The Rationale for the Middle Level School
10. Making the Transition to Middle Level Schools

California League of Middle Schools, 201 L Street, Sacramento, CA 95816. Copyrights 1988-89. Cost: $4.25 per monograph, includes postage and California sales tax.

The Middle Level News. A newsletter published five times annually. California League of Middle Schools, 201 L Street, Sacramento, CA 95816. Cost: $40.00 for CLMS membership.

# PROFESSIONAL ORGANIZATIONS

Association for California School Administrators
1575 Old Bayshore Highway
Burlingame, CA 94010
(415) 692-4300

Association for Supervision and Curriculum Development
1250 N. Pitt St.
Alexandria, VA 22314
(703) 549-9110

California League of Middle Schools
1107 Ninth Street, Suite 150
Sacramento, CA 95814
(916) 447-7838

National Association of Secondary School Principals
1904 Association Drive
Reston, VA 22091
(804) 860-0200

National Middle School Association
4807 Evanswood Drive
Columbus, OH 43229-6292
(614) 848-8211

# NMSA
## PUBLICATION RESOURCES

Adviser-Advisee Programs: Why, What, and How
Michael Jones
#603 - 75 pages - ISBN-1-56090-029-6
Rationale, guidelines for establishing programs, and six descriptions of ongoing programs prepared by the practioners concerned are included in this helpful publication.

A Journey Through Time: A Chronology of Middle Level Education Resources
Edward J. Lawton
#902 - 36 pages - ISBN-1-56090-042-3
More than 20 years have passed since the shift toward middle schools began and a review of the literature which has both charted and helped form this movement is appropriate. The book is arranged chronologically in three time periods to assist as practical aids to those involved in various stages of middle school operation. The final chapter lists major professional associations and organizations that publish materials and provide other services on middle level education.

Cognitive Matched Instruction in Action
Esther Fusco and Associates
#703 - 36 pages - ISBN-1-56090-034-2
A description of the well known program at Shoreham-Wading River Middle School which provides instruction that is related to varied cognitive levels.

Developing Effective Middle Schools Through Faculty Participation
Elliot Y. Merenbloom
#804 - 122 pages - ISBN-1-56090-040-7
A grealy expanded edition of this important and popular handbook. A must for faculties seeking to implement the middle school concept.

Dynamite in the Classroom: A How-To-Handbook for Teachers
Sandra Schurr
#901 - 272 pages - ISBN-1-5690-041-5
This book does not set forth curriculum content, rather it focuses on methods and activities that lead to the enlargement and development of critically important intellectual skills. It shows how to differentiate instruction, giving full directions and plenty of examples. Its value is not limited to any particular subject area and is loaded with reproducible classroom-ready activities.

Enhancing Learning Through Oral and Written Expression: Strategies for Subject Area Teachers

Ronnie L. Sheppard

#501 - 112 pages - ISBN-1-56090-024-5

Help for teachers in planning classroom instruction using oral and written expression as vehicles for learning all subjects. Examples included.

Evidence for the Middle School

Paul George and Lynn Oldaker

#503 - 52 pages - ISBN-1-56090-026-1

Data to support the advocacy of middle schools are presented in this monograph. Summaries of relevant research, including a study of 130 middle schools are examined.

Guidance in Middle Level Schools: Everyone's Responsibility

Clarie Cole

#802 - 31 pages - ISBN-1-56090-038-5

A special place of and nature of guidance at the middle level are examined in an interesting manner with roles of various persons delineated.

Interdisciplinary Teaching: Why and How

#704 - 56 pages - ISBN-1-56090-035-0

Ways to accommodate and foster interdisciplinary teaching are described in this much needed monograph. Convincing rationale included.

Involving Parents in Middle Level Education

John W. Myers

#502 - 52 pages - ISBN-1-56090-025-3

Reasons for parental involvement, roles parents can play, and specific steps needed to establish a parent involvement program are included along with descriptions of six on-going programs.

Japanese Junior High School: A View From The Inside

Paul George with Evan George and Tadahiko Abiko

#904 - 56 pages - ISBN-1-56090-044-X

This rare and unusual volume presents an intimate view of the Japanese Junior High School seen primarily through the eyes of Paul George during seven weeks of observation. The book is seasoned by occasional reaction of Dr. George's son, Evan, a seventh grader who enrolled in a Japanese school for seven weeks and is given further credence by the reflections of Professor Abiko, a Japanese Educator who has studied both Japanese and American schools.

Long-Term Teacher/Student Relationships: A Middle School Case Study
Paul George with Melody Spreula and Jane Moorefield
#701 - 30 pages - ISBN-1-56090-032-6
The clear benefits of maintaining student/teacher relationships beyond one year are revealed in this report of a study done at Lincoln Middle School, Gainesville, Florida.

Middle School, The
Donald H. Eichhorn
#702 - 128 pages - ISBN-1-56090-033-4
The 1966 "classic" reissued. Still fully revelant and valid as a foundation and description of a middle school based on the developmental realities of early adolescents.

Middle School Journal
A limited number of bound volumes of the *Middle School Journal* are available for sale. Attractively bound in a steel spiral format, these issues are a must for schools, college libraries, or professionals seeking to complete their collectrion of the *Journal* from its earliest issues. The books are also offered at special prices. Please note that the 1974, 1976, 1977, and 1981 bound volumes are out of print.

| Volume | Year | Order # | ISBN # |
|---|---|---|---|
| I-IV | 1970-73 | #J01 | 1-56090-000-8 |
| VI | 1975 | #J03 | 1-56090-001-6 |
| IX | 1978 | #J06 | 1-56090-003-2 |
| X | 1979 | #J07 | 1-56090-004-0 |
| XI | 1980 | #J08 | 1-56090-005-9 |
| XII | 1982 | #J10 | 1-56090-006-7 |

Middle School Education: As I See It
John Lounsbury
#401 - 64 pages - ISBN-1-56090-022-9
The brief, readable, and stimulating columns of the editor of the *Middle School Journal* are presented in this attractive monograph.

Middle School in Profile: A Day in the Seventh Grade
John Lounsbury, Jean Marani, and Mary Compton
#003 - 88 pages - ISBN-1-56090-017-2
Presents a real and revealing picture of middle school education from the seventh grader's viewpoint. Based on 100 shadow studies.

New American Family and the Schools

J. Howard Johnston

#1001 - 48 pages

In the four chapters, *The New American Family in Profile, the Family as Educator, Barriers to Home-School Cooperation* and *Involving Families in Schooling*, the author fully, factually, and forthrightly deals with this major educational and social phenomenon. Drawing on the works of leading scholars in the field, Dr. Johnston's treatment provides a significant resource for educators at all levels who are facing the necessity of adjusting traditional school practices to the changing family.

Perspectives: Middle School Education

John H. Lounsbury, editor

#402 - 190 pages - ISBN-1-56090-02307

A major book which documents the history of the movement and discusses major aspects such as curriculum organization, instructional strategies, administration, research and teacher education. Contains 15 chapters authored by some of the leading authorities on middle level education.

Positive Discipline: A Pocketful of Ideas

William Purkey and David Strahan

#605 - 56 pages - ISBN-1-56090-031-8

"Invitational Education" applied specifically to discipline. A much needed positive look at discipline featuring immediately applicable to-the-classroom ideas. An *nmsa* best seller.

Preparing to Teach at the Middle Level

William M. Alexander and C. Kenneth McEwin

#803 - 64 pages - ISBN-1-56090-039-3

The first comprehensive treatment of this critical issue. Contains new data on status, complete examples of successful programs and guidelines.

Research Annuals

For the past 12 years, the *National Middle School Association* has published a Research Annual featuring significant works presented at the Annual Conference. The 1982 thru 1986 annuals are out of print. The remainder, however, are still available through *nmsa*.

| Annual | Order # | ISBN # |
|---|---|---|
| 1989 | #R89 | 1-56090-045-8 |
| 1988 | #R88 | 1-56090-014-8 |
| 1987 | #R87 | 1-56090-013-X |
| 1981 | #R81 | 1-56090-011-3 |
| 1977-79 Vol. 1 | #R01 | 1-56090-007-5 |

Schools in the Middle: Status and Progress
William M. Alexander and C. Kenneth McEwin
#903 - 112 pages - ISBN-1-56090-043-1
Here at last is a major national research study that provides detailed data on the middle school movement. The study is partially a replication of the first national study conducted by Alexander in 1968, and yields information on the progress of the movement as well as reflects current practices in middle level schools. Schools with different organizations (5-8, 6-8, 7-8, 7-9) are compared with reference to various critical elements and related factors. Charts and graphics included.

Teachers as Inquirers: Strategies for Learning With and About Early Adolescents
Chris Stevenson
#604 - 52 pages - ISBN-1-56090-030-X
Describes fully how teachers can actively involve students in gathering and analyzing information about them and their world. Many examples are included.

Teacher to Teacher
Nancy Doda
#101 - 64 pages - ISBN-1-56090-018-0
An inviting and inspiring resource for teachers. Affective education, discipline, and interdisciplinary teaching among topics treated by this humane teacher.

Team Process in the Middle School: A Handbook for Teachers
Elliot Y. Merenbloom
#302 - 120 pages - ISBN-1-56090-020-2
A thorough reality based guide that will make operational the organization of an instructional program around teams. Detailed examples included. Another *nmsa* best seller.

Theory Z School: Beyond Effectiveness
Paul S. George
#303 - 106 pages - ISBN-1-56090-021-0
Research on school effectiveness and successful business management applied to the presentation of a middle school that is effective and provides for full personal growth.

This We Believe
*nmsa* Committee
#202 - 24 pages - ISBN-1-56090-01909
A consensus statement on the nature of and rationale for middle school education. Ten "essential elements" are set forth. Brief and useful with professionals and the general public. *nmsa's* all-time best seller.

What Research Says to the Middle School Level
J. Howard Johnston and Glenn C. Markle
#602 - 112 pages - ISBN-56090-028-8
Significant research finding on twenty-two topics including effective schools, promotion and retention, ability grouping, self-concept, and classroom management.

When the Kids Come First: Enhancing Self-Esteem
James A Beane and Richard P. Lipka
#705 - 96 pages - ISBN-1-56090-036-9
A strong case for the middle school's proactive improvement of pupils' self-esteem, "a compelling moral imperative." Ample descriptions of how to accomplish this goal are included.

Who They Are, How We Teach: Early Adolescents and Their Teachers
C. Kenneth McEwin and Julia Thomason
#905 - 26 pages - ISBN-1-56090-046-6
A comprehensive documentation of the most significant characteristics of middle grades students in terms of intellectual, physical, emotional and social growth compared to the characteristics of effective middle grades teachers. Implications of teacher/learner data for curriculum and instruction are explored.

Young Adolescent Development and School Practices: Promoting Harmony
John Van Hoose and David Strahan
#801 - 68 pages - ISBN-1-5-6090-037-7
The physical, social, emotional, and intellectual characteristics of young adolescents are related to school programs/practices which are/are not in harmony.

# NMSA
## VIDEO RESOURCES

Early Adolescence: A Time of Change Implications for Schools

#805V (VHS only) - 50 minutes - ISBN-1-56090-016-4

(22 pages utilization guide included)

This 50-minute video reviews the physical, social, emotional and intellectual characteristics of middle level students and provides a host of ideas for educators as they seek to improve education in the middle level. Interviews with a variety of middle grades educators reflect on the changes and needs of early adolescents. Teachers and administrators offer suggestions and ideas that can be implemented throughout the middle school years. Some of the areas explored include implications for the curriculum, instructional strategies, discipline, school climate and improvement of self-concept. A companion to Early Adolescence: A Time of Change Implications for Parents, this tape offers an excellent introduction for new as well as experienced staff members and acts as a springboard for indepth discussions at many levels.

Early Adolescence: A Time of Change-Implications for Parents

#706V (available in VHS or Beta) - 37 minutes - ISBN-1-56090-015-6

This video looks at family relationships and how they are affected during early adolescence. Developed at the University of Wisconsin-Eau Claire, this video is especially useful in informing parents and promoting discussion about early adolescent development.

# CALIFORNIA DEPARTMENT OF EDUCATION
# OFFICE OF MIDDLE GRADES SUPPORT SERVICES

## Contact Persons

State Department of Education
Office of Middle Grades Support Services
721 Capitol Mall, P.O. Box 9444272
Sacramento, CA 94244-2720

**Thaddeus Dumas**, Manager
(916) 324-7149

**Mary Ann Overton**, Consultant
(916) 324-7201

**Robert Schallig**, Consultant
(916) 324-0087

**Penni Hansen**, Consultant
(916) 322-2174

# REGIONAL NETWORKS OF MIDDLE GRADES PARTNERSHIP AND FOUNDATION SCHOOLS

**Region A** - Penni Hansen, CDE Consultant

| County | District | School |
|---|---|---|
| *Butte | Oroville City Elementary | Central Elementary |
| Nevada | Nevada City | Seven Hills School |
| Nevada | Twin Ridges Elementary | Grizzly Hill School |
| Sacramento | San Juan Unified | Barrett Middle School |
| Sacramento | San Juan Unified | Carnegie Intermediate |
| Sacramento | San Juan Unified | Churchill (Winston) Int. |
| Sacramento | San Juan Unified | Salk (Jonas) Intermediate |
| Shasta | Redding Elementary | Sequoia Middle School |
| Siskiyou | Butte Valley Unified | Macdoel Elementary |
| Trinity | Mountain Valley Unified | Hayfork Elementary |
| Yolo | Washington Unified | Golden State Middle |

**Region B** - Robert Schallig, CDE Consultant

| County | District | School |
|---|---|---|
| *Tulare | Woodlake Union Elementary | Woodlake Intermediate |
| Fresno | Clovis Unified | Clark Intermediate |
| Fresno | Clovis Unified | Kastner Intermediate |
| Fresno | Clovis Unified | Scandinavian Middle |
| Fresno | Clovis Unified | Tehipite Middle School |
| Fresno | Clovis Unified | Tioga Middle School |
| Kern | Sierra Sands Unified | Monroe (James) Jr. High |
| Madera | Madera Unified | La Vina Elementary School |
| Merced | Merced City Elementary | Herbert Hoover Elementary |
| Merced | Winston Elementary | Sparks (Frank) Elementary |
| Tulare | Kings River Union | Kings River Elementary |

**Region C** - Penni Hansen, CDE Consultant

| County | District | School |
|---|---|---|
| *San Bernardino | San Bernardino City Unified | Shandin Hills Intermediate |
| Riverside | Coachella Valley Unified | Duke (Bobby) Middle |
| Riverside | Desert Sands Unified | Palm Desert Middle School |
| Riverside | Elsinore Union High | Elsinore Jr. High School |
| Riverside | Jurupa Unified | Jurupa Jr. High School |
| Riverside | Perris Union High | Pinacate Middle School |
| San Bernardino | Chino Unified | Lyle S. Briggs Fundamental |
| San Bernardino | Colton Joint Unified | Terrace Hills Jr. High |
| San Bernardino | Fontana Unified | Southridge Middle School |
| San Bernardino | Morongo Unified | La Contenta Jr. High |
| San Bernardino | San Bernardino City Unified | Arrowview Intermediate |
| San Bernardino | San Bernardino City Unified | Curtis Intermediate |

**Region D** - Robert Schallig, CDE Consultant

| County | District | School |
|---|---|---|
| *San Diego | Sweetwater Union High | Montgomery Jr. High |
| Imperial | Brawley | Barbara Worth Jr. High |
| Imperial | Imperial Unified | Frank Wright Intermediate |
| San Diego | Carlsbad Unified | Valley Jr. High School |
| San Diego | Jamul-Dulzura Union | Oak Grove Middle School |
| San Diego | San Diego Unified | Correia Jr. High School |
| San Diego | San Diego Unified | Montgomery (John) Jr. High |
| San Diego | San Dieguito Union High | Diegueno Jr. High School |
| San Diego | Sweetwater Union High | National City Jr. High |
| San Diego | Sweetwater Union High | Southwest Jr. High School |
| San Diego | Vista Unified | Washington Middle School |

**Region E** - Mary Ann Overton, CDE Consultant

| County | District | School |
|---|---|---|
| *Orange | Huntington Beach City | Dwyer Middle School |
| Los Angeles | Palos Verdes Peninsula Unified | Ridgecrest Intermediate |
| Orange | Fullerton Elementary | Ladera Vista Jr. High |
| Orange | Irvine Unified | Venado Middle School |

**Region E** - Mary Ann Overton, CDE Consultant (continued)

| County | District | School |
|---|---|---|
| *Orange | La Habra City Elementary | Imperial Middle School |
| Orange | La Habra City Elementary | Washington Middle School |
| Orange | Los Alamitos Unified | McAuliffe Middle School |
| Orange | Orange Unified | El Rancho Middle School |
| Orange | Placentia Unified | Tuffree Jr. High School |
| Orange | Saddleback Valley Unified | Serrano Intermediate |
| Orange | Santa Ana Unified | MacArthur Fund. Int. |
| Orange | Santa Ana Unified | Spurgeon Intermediate |

**Region F** - Robert Schallig, CDE Consultant

| County | District | School |
|---|---|---|
| *Los Angeles | Los Angeles Unified | Bret Harte Jr. High |
| Los Angeles | Los Angeles Unified | Adams (John) Jr. High |
| Los Angeles | Los Angeles Unified | Belvedere Jr. High |
| Los Angeles | Los Angeles Unified | Berendo Jr. High |
| Los Angeles | Los Angeles Unified | Edison (Thomas) Jr. High |
| Los Angeles | Los Angeles Unified | Northridge Jr. High |
| Los Angeles | Los Angeles Unified | Parkman Jr. High |
| Los Angeles | Los Angeles Unified | Markham Intermediate |
| Los Angeles | Los Angeles Unified | South Gate Jr. High |
| Los Angeles | Los Angeles Unified | Sutter (John) Jr. High |

**Region G** - Mary Ann Overton, CDE Consultant

| County | District | School |
|---|---|---|
| *Los Angeles | Walnut Valley Unified | Chapparal Middle School |
| Los Angeles | ABC Unified | Killingsworth Jr. High |
| Los Angeles | Bassett Unified | Edgewood Middle School |
| Los Angeles | Bonita Unified | Lone Hill Intermediate |
| Los Angeles | Burbank Unified | Luther Burbank Jr. High |
| Los Angeles | Glendale Unified | Roosevelt (Theo.) Jr. High |
| Los Angeles | Hacienda La Puente Unified | Fred M. Sparks Jr. High |
| Los Angeles | Las Virgenes Unified | Lindero Canyon Middle |
| Los Angeles | Pasadena Unified | Charles W. Eliot Middle |
| Los Angeles | Rowland Unified | Alvarado Intermediate |
| Los Angeles | Rowland Unified | Giano Intermediate |
| Los Angeles | William S. Hart Union High | Arroyo Seco Jr. High |
| Los Angeles | Ventura Unified | Anacapa Middle School |

**Region H** - Mary Ann Overton, CDE Consultant

| County | District | School |
|---|---|---|
| *San Mateo | Burlingame Elementary | Burlingame Intermediate |
| Monterey | Salinas Union High | El Sausal Jr. High |
| Monterey | Salinas Union High | Washington Jr. High |
| San Mateo | Cabrillo Unified | Cunha (Manuel ) Int. |
| San Mateo | Redwood City Elementary | McKinley Middle School |
| Santa Clara | Alum Rock Union Elementary | Sheppard Middle School |
| Santa Clara | Campbell Union Elementary | Monroe Middle School |
| Santa Clara | Cupertino Union Elementary | Hyde Jr. High School |
| Santa Clara | Franklin-McKinley Elementary | Fair (Wilbur) Jr. High |
| Santa Clara | Franklin-McKinley Elementary | Sylvandale Jr. High |
| Santa Clara | Los Gatos Union Elementary | Fisher (R.J.) Jr. High |
| Santa Cruz | Soquel Elementary | New Brighton Middle |

**Region I** - Mary Ann Overton, CDE Consultant

| County | District | School |
|---|---|---|
| *Contra Costa | San Ramon Valley Unified | Los Cerros Intermediate |
| Alameda | Albany Unified | Albany Middle School |
| Alameda | Berkeley Unified | Willard Jr. High |
| Alameda | Hayward Unified | Bret Harte Intermediate |
| Alameda | Pleasanton Joint Union | Harvest Park Intermediate |
| Alameda | San Leandro Unified | Bancroft Junior High |
| Contra Costa | Mt. Diablo Unified | Pine Hollow Intermediate |
| Contra Costa | Mt. Diablo Unified | Riverview Middle School |
| Contra Costa | San Ramon Valley Unified | Pine Valley Intermediate |
| Contra Costa | San Ramon Valley Unified | Stone Valley Intermediate |
| San Joaquin | Jefferson Elementary | Jefferson Elementary |

**Region J.** - Penni Hansen, , CDE Consultant

| County | District | School |
|---|---|---|
| *Napa | Napa Valley Unified | Silverado Middle School |
| Humboldt | Arcata Elementary | Sunny Brae Middle |
| Lake | Middletown Unified | Middletown Middle School |
| Marin | Dixie Elementary | Miller Creek Middle School |
| Marin | Novato Unified | San Jose Middle School |

**Region J.** - Penni Hansen, , CDE Consultant (continued)

| County | District | School |
|---|---|---|
| Marin | Reed Union Elementary | Del Mar Intermediate |
| Marin | San Rafael City | James Davidson Middle |
| Mendocino | Anderson Valley Unified | Anderson Valley Jr./Sr. High |
| Mendocino | Arena Union Elementary | Arena Union Elementary |
| Solano | Vacaville Unified | Willis Jepson Jr. High |
| Sonoma | Petaluma Joint Union High | Petaluma Jr. High |

*Foundation Schools

# REGIONAL NETWORKS OF MIDDLE GRADES
# PARTNERSHIP SCHOOLS EXPANSION NETWORK
# 1990

**REGION A-1** - Penni Hansen, CDE Consultant

| County | District | School |
|---|---|---|
| Butte | Gridley Union | Sycamore Middle |
| Glenn | Orland Joint Union | C.K. Price Middle |
| Siskiyou | Etna Union High | Scott Valley Junior High |
| Siskiyou | Mount Shasta Union | Sisson Elementary |

**REGION K** - Penni Hansen, CDE Consultant

| County | District | School |
|---|---|---|
| Humboldt | Orick | Orick |
| Lake | Kelseyville Unified | Mountain Vista Middle |
| Mendocino | Ukiah Unified | Redwood Valley Middle |
| Napa | Napa Valley Unified | Redwood Middle |
| Solano | Travis Unified | Golden West Intermediate |
| Solano | Vacaville Unified | Vaca Pena Intermediate |
| Sonoma | Healdsburg Union High | Healdsburg Junior High |
| Sonoma | Sonoma Valley Unified | Altimira Intermediate |

**REGION L** - Mary Ann Overton, CDE Consultant

| County | District | School |
|---|---|---|
| Alameda | Newark Unified | Newark Junior High |
| Alameda | Oakland Unified | King Estates Junior High |
| Alameda | Oakland Unified | Frick Junior High |
| San Mateo | Hillsborough City | William Crocker Middle |
| Santa Clara | Campbell Union | Rollings Hills Middle |
| Santa Clara | Campbell Union | Campbell Middle |
| Santa Clara | Palo Alto Unified | Jane Stanford Middle |

**REGION L** - Mary Ann Overton, CDE Consultant (continued)

| County | District | School |
|---|---|---|
| Santa Cruz | San Lorenzo Valley Unified | San Lorenzo Valley JHS |
| Santa Clara | San Jose Unified | Castillero Middle |
| Santa Clara | Sunnyvale Elementary | Sunnyvale Junior High |

**REGION M** - Mary Ann Overton, CDE Consultant

| County | District | School |
|---|---|---|
| Alameda | Berkeley Unified | Martin L. King Junior High |
| Alameda | Castro Valley Unified | Canyon Middle |
| Alameda | Dublin Unified | Wells Middle |
| Alameda | New Haven Unified | Alvarado Middle |
| Alameda | Oakland Unified | Roosevelt Junior High |
| Alameda | Oakland Unified | Claremont Middle |
| Alameda | Oakland Unified | Bret Harte Junior High |
| Contra Costa | Mount Diablo Unified | Valley View Middle |
| Contra Costa | Pleasanton Unified | Pleasanton Middle |

**REGION N** - Mary Ann Overton, CDE Consultant

| County | District | School |
|---|---|---|
| Sacramento | Sacramento Unified | Fern Bacon Middle |
| Sacramento | San Juan Unified | Will Rogers Middle |
| San Joaquin | Escalon Unified | El Portal Middle |
| Stanislaus | Ceres Unified | Mae Hensley Junior High |
| Stanislaus | Empire Union | Teel Middle |
| Stanislaus | Oakdale Union Elementary | Oakdale Junior High |
| Stanislaus | Patterson Unified | Patterson Junior High |
| Stanislaus | Sylvan Union | Somerset Senior Elem. |

**REGION O** - Robert Schallig, CDE Consultant

| County | District | School |
|---|---|---|
| Fresno | Firebaugh-Las Deltas USD | Firebaugh Junior High |
| Fresno | Fresno Unified | Ahwahnee Middle |
| Fresno | Fresno Unified | Tenaya Middle |
| Fresno | Kings Canyon Unified | General Grant Junior High |
| Kings | Lemoore Union Elementary | P.W. Engvall Middle |
| Madera | Chowchilla | Wilson Middle |
| Mariposa | Mariposa Co. Unified | Mariposa Junior High |
| Tulare | Dinuba Elementary | Washington Intermediate |
| Tulare | Lindsay | Garvey Junior High |
| Tulare | Porterville Elementary | Pioneer Junior High |

**REGION P** - Penni Hansen, CDE Consultant

| County | District | School |
|---|---|---|
| Riverside | Alvord Unified | Loma Vista Intermediate |
| Riverside | Banning Unified | Coombs Middle |
| Riverside | Desert Sands Unified | Thomas Jefferson Middle |
| Riverside | Desert Sands Unified | La Quinta Middle |
| Riverside | Jurupa Unified | Mission Middle |
| Riverside | Lake Elsinore Unified | Terra Cotta Junior High |
| Riverside | Moreno Valley Unified | Butterfield Middle |
| Riverside | Palo Verde Unified | Blythe Middle |
| Riverside | Temecula Valley Unified | Margarita Middle |
| San Bernardino | Helendale | Riverview Middle |
| San Bernardino | Morongo Unified | Twentynine Palms JHS |
| San Bernardino | Yucaipa Joint Unified | Yucaipa Middle |

**REGION Q** - Penni Hansen, CDE Consultant

| County | District | School |
|---|---|---|
| Los Angeles | Bassett Unified | Torch Middle |
| Los Angeles | Bonita Unified | Ramona Intermediate |
| Los Angeles | El Monte City | Columbia |
| Los Angeles | Hacineda La Puente | Sierra Vista Middle |

**REGION Q** - Penni Hansen, CDE Consultant (continued)

| County | District | School |
|---|---|---|
| Los Angeles | West Covina Unified | Edgewood Middle |
| San Bernardino | Etiwanda | Etiwanda Intermediate |
| San Bernardino | Fontana Unified | Fontana Junior High |
| San Bernardino | Fontana Unified | Almeria Middle |
| San Bernardino | Ontario-Montclair | Vernon Middle |
| San Bernardino | San Bernardino City USD | Serrano Middle |

**REGION R** - Robert Schallig, CDE Consultant

| County | District | School |
|---|---|---|
| Los Angeles | Burbank Unified | David S. Jordan Junior High |
| Los Angeles | Burbank Unified | John Muir Junior High |
| Los Angeles | Hawthorne Elementary | Hawthorne Intermediate |
| Los Angeles | Lawndale | Will Rogers Intermediate |
| Los Angeles | Lennox | Lennox Middle |
| Los Angeles | Los Angeles Unified | Henry Gage Junior High |
| Los Angeles | Los Angeles Unified | Chester Nimitz Junior High |
| Los Angeles | Monrovia Unified | Clifton Middle |
| Los Angeles | Pasadena Unified | Washington Middle |
| Los Angeles | South Pasadena Unified | South Pasadena Middle |

**REGION S** - Robert Schallig, CDE Consultant

| County | District | School |
|---|---|---|
| Los Angeles | Castaic Union | Castaic Middle |
| Los Angeles | Los Angeles Unified | Millikan Junior High |
| Los Angeles | Santa Monica-Malibu USD | Lincoln Middle |
| Ventura | Moorpark Unified | Chaparral Middle |
| Ventura | Pleasant Valley Elem. | Monte Vista Intermediate |
| Ventura | Simi Valley Unified | Sinaloa Junior High |
| Ventura | Ventura Unified | Cabrillo Middle |
| Ventura | Ventura Unified | Balboa Middle |

**REGION T** - Mary Ann Overton, CDE Consultant

| County | District | School |
|---|---|---|
| Orange | Anaheim Union High | Ball Junior High |
| Orange | Anaheim Union High | Dale Junior High |
| Orange | Anaheim Union High | Walker Junior High |
| Orange | Anaheim Union High | Lexington Junior High |
| Orange | Anaheim Union High | South Junior High |
| Orange | Irvine Unified | Vista Verde |
| Orange | Orange Unified | Cerro Villa Middle |
| Orange | Orange Unified | Santiago Middle |
| Orange | Saddleback Valley Unified | La Paz Intermediate |
| Orange | Saddleback Valley Unified | Los Alisos Intermediate |
| Orange | Santa Ana Unified | Sierra Intermediate |
| Orange | Tustin Unified | Hewes Middle |

**REGION U** - Robert Schallig, CDE Consultant

| County | District | School |
|---|---|---|
| San Diego | Escondido Union | Del Dios Middle |
| San Diego | Lakeside Union | Tierra del Sol Middle |
| San Diego | Ramona Unified | Olive Pierce Middle |
| San Diego | San Diego City | Wm H. Taft Junior High |
| San Diego | San Diego City | George Marston Middle |
| San Diego | San Diego City | Woodrow Wilson Academy |
| San Diego | San Diego City | Ray Kroc Middle |
| San Diego | San Dieguito Union High | Earl Warren Junior High |
| San Diego | San Dieguito Union High | Oak Crest Junior High |
| San Diego | Valley Center Union Elem. | Valley Center Middle |

# California Curriculum Projects

| | |
|---|---|
| CALIFORNIA ARTS PROJECT | Glenda Gentry, Director<br>P. O. Box 4925<br>San Rafael, CA 94913<br>(415) 499-5893 |
| CALIFORNIA LITERATURE PROJECT | Mary Barr, Director<br>California Literature Project<br>Bayview Terrace Elementary School<br>2445 Fogg Street<br>San Diego, CA 92109<br>(619) 270-8418 |
| CALIFORNIA WRITING PROJECT | James Gray, Director<br>California Writing Project<br>School of Education<br>University of California<br>Berkeley, CA 94720<br>(415) 642-0963 |
| CALIFORNIA MATHEMATICS PROJECT | Phil Daro, Executive Director<br>California Mathematics Project<br>Office of the President<br>Universitgy of California<br>Berkeley, CA 94720<br>(415) 643-7310 |
| CALIFORNIA SCIENCE PROJECT | Elizabeth Stage, Director<br>U. C. Berkeley<br>359 University Hall<br>Berkeley, CA 94720<br>(415) 643-8892 |
| CALIFORNIA ENVIRONMENTAL EDUCATION AWARENESS PROJECT | Care Butler, Director<br>Fresno County Schools<br>2314 Mariposa Street<br>Fresno, CA 93721<br>(209) 488-3307 |
| CALIFORNIA INTERNATIONAL STUDIES PROJECT | Duarte Silva, Foreign Language Coord.<br>Littlefield Center, Room 14<br>Stanford University<br>Palo Alto, CA 94305<br>(415) 723-4581 |

| | |
|---|---|
| HEALTHY SCHOOLS PROGRAM | Pamela Luna-Raffy, Director<br>Riverside County Office of Education<br>P.O. Box 868<br>Riversiode, CA 92502<br>(714) 788-6599 |
| PREVNET | Charlie Matus, Director<br>Sacramento County Office of Education<br>9738 Lincoln Village Drive<br>Sacramento, CA 95827<br>(916) 366-4421 |
| COMPREHENSIVE HEALTH EDUCATION RESOURCE CENTER | Priscilla Naworski, Director<br>Vallejo Unified School District<br>321 Wallace Avenue<br>Vallejo, CA 94590<br>(707) 557-1592 |
| CALIFORNIA HUMANITIES PROJECT | Michael Hoffman, Director<br>Department of English<br>U. C. Davis<br>Davis, CA 95616<br>(916) 753-8979 |
| HISTORY PROJECT IN CALIFORNIA | Pat Taylor, Director<br>U. C. L. A., Gayley Center<br>405 Hilgard Avenue<br>Los Angeles, CA 90024<br>(213) 206-0256 |
| CALIFORNIA TECHNOLOGY PROJECT | Craig Blurton, Director<br>SWRL<br>P. O. Box 3842<br>Seal Beach, CA 90740<br>213) 985-9631 |
| CALIFORNIA LEAGUE OF MIDDLE SCHOOLS | 2401 - L Street<br>Sacramento, CA 95816<br>(916) 447-2474 |
| OFFICE OF MIDDLE GRADES SUPPORT SERVICES | 721 Capitol Mall<br>Sacramento, CA 94244-2720<br>(916) 324-7201 |
| OFFICE OF SCHOOL IMPROVEMENT | 721 Capitol Mall, Rm. 622<br>Sacramento, CA 95814<br>(916) 322-5954 |
| CALIFORNIA INSTITUTE FOR SCHOOL IMPROVEMENT | 2401 - L Street<br>Sacramento, CA 95816<br>(916) 447-2474 |

## Publications Available from the Department of Education

This publication is one of over 650 that are available from the California State Department of Education. Some of the more recent publications or those most widely used are the following:

| ISBN | Title (Date of publication) | Price |
|---|---|---|
| 0-8011-0271-5 | Academic Honesty (1986) | $2.50 |
| 0-8011-0471-8 | Addendum to the 1985-86 California Private School Directory (1986) | 7.75 |
| 0-8011-0272-3 | Administration of Maintenance and Operations in California School Districts (1986) | 6.75 |
| 0-8011-0216-2 | Bilingual-Crosscultural Teacher Aides: A Resource Guide (1984) | 3.50 |
| 0-8011-0238-3 | Boating the Right Way (1985) | 4.00 |
| 0-8011-0275-8 | California Dropouts: A Status Report (1986) | 2.50 |
| 0-8011-0472-6 | California Private School Directory (1986) | 9.00 |
| 0-8011-0473-4 | California Public School Directory (1987) | 14.00 |
| 0-8011-0488-2 | Caught in the Middle: Educational Reform for Young Adolescents in California Public Schools (1987) | 5.00 |
| 0-8011-0493-9 | Challenge of Excellence: Annual Report, 1986 (1987) | 3.00 |
| 0-8011-0241-3 | Computer Applications Planning (1985) | 5.00 |
| 0-8011-0242-1 | Computers in Education: Goals and Content (1985) | 2.50 |
| 0-8011-0659-1 | Educational Software Preview Guide (1987) | 2.00 |
| 0-8011-0489-0 | Effective Practices in Achieving Compensatory Education-Funded Schools II (1987) | 5.00 |
| 0-8011-0243-X | Elementary School Program Quality Criteria (1985) | 3.25 |
| 0-8011-0041-0 | English-Language Arts Framework for California Public Schools (1987) | 3.00 |
| 0-8011-0663-X | English-Language Arts Model Curriculum Guide, K—8 (1987) | 2.25 |
| 0-8011-0247-2 | Handbook for Conducting an Elementary Program Review (1985) | 4.50 |
| 0-8011-0248-0 | Handbook for Conducting a Secondary Program Review (1985) | 4.50 |
| 0-8011-0289-8 | Handbook for Physical Education (1986) | 4.50 |
| 0-8011-0249-9 | Handbook for Planning an Effective Foreign Language Program (1985) | 3.50 |
| 0-8011-0320-7 | Handbook for Planning an Effective Literature Program (1987) | 3.00 |
| 0-8011-0179-4 | Handbook for Planning an Effective Mathematics Program (1982) | 2.00 |
| 0-8011-0290-1 | Handbook for Planning an Effective Writing Program (1986) | 2.50 |
| 0-8011-0224-3 | Handbook for Teaching Cantonese-Speaking Students (1984) | 4.50 |
| 0-8011-0291-X | Handbook for Teaching Pilipino-Speaking Students (1986) | 4.50 |
| 0-8011-0204-9 | Handbook for Teaching Portuguese-Speaking Students (1983) | 4.50 |
| 0-8011-0250-2 | Handbook on California Education for Language Minority Parents—Chinese/English Edition (1985) | 3.25* |
| 0-8011-0227-8 | Individual Learning Programs for Limited-English-Proficient Students (1984) | 3.50 |
| 0-8011-0466-1 | Instructional Patterns: Curriculum for Parenthood Education (1985) | 12.00 |
| 0-8011-0208-1 | Manual of First-Aid Practices for School Bus Drivers (1983) | 1.75 |
| 0-8011-0209-X | Martin Luther King, Jr., 1929—1968 (1983) | 3.25 |
| 0-8011-0358-4 | Mathematics Framework for California Public Schools (1985) | 3.00 |
| 0-8011-0664-8 | Mathematics Model Curriculum Guide, K—8 (1987) | 2.75 |
| 0-8011-0252-9 | Model Curriculum Standards: Grades 9—12 (1985) | 5.50 |
| 0-8011-0229-4 | Nutrition Education—Choose Well, Be Well: A Curriculum Guide for Junior High School (1984) | 8.00 |
| 0-8011-0228-6 | Nutrition Education—Choose Well, Be Well: A Curriculum Guide for High School (1984) | 8.00 |
| 0-8011-0182-4 | Nutrition Education—Choose Well, Be Well: A Curriculum Guide for Preschool and Kindergarten (1982) | 8.00 |
| 0-8011-0183-2 | Nutrition Education—Choose Well, Be Well: A Curriculum Guide for the Primary Grades (1982) | 8.00 |
| 0-8011-0184-0 | Nutrition Education—Choose Well, Be Well: A Curriculum Guide for the Upper Elementary Grades (1982) | 8.00 |
| 0-8011-0230-8 | Nutrition Education—Choose Well, Be Well: A Resource Manual for Parent and Community Involvement in Nutrition Education Programs (1984) | 4.50 |
| 0-8011-0185-9 | Nutrition Education—Choose Well, Be Well: A Resource Manual for Preschool, Kindergarten, and Elementary Teachers (1982) | 2.25 |
| 0-8011-0186-7 | Nutrition Education—Choose Well, Be Well: A Resource Manual for Secondary Teachers (1982) | 2.25 |
| 0-8011-0253-7 | Nutrition Education—Choose Well, Be Well: Food Photo Cards (with nutrient composition charts) (1985) | 10.00 |
| 0-8011-0254-5 | Nutrition Education—Choose Well, Be Well: Teaching Materials for Preschool/Kindergarten Curriculum Guide (in color) (1985) | 7.50 |

*The following editions are also available, at the same price: Armenian/English, Cambodian/English, Hmong English, Korean/English, Laotian/English, Spanish/English, and Vietnamese/English.

| | | |
|---|---|---|
| 0-8011-0255-3 | Nutrition Education—Compute Well, Be Well: Computer Activities for the Classroom, Preschool/Kindergarten (1985) | 12.50 |
| 0-8011-0256-1 | Nutrition Education—Compute Well, Be Well: Computer Activities for the Classroom, Grades 1—3 (1985) | 12.50 |
| 0-8011-0257-X | Nutrition Education—Compute Well, Be Well: Computer Activities for the Classroom, Grades 4—6 (1985) | 12.50 |
| 0-8011-0303-7 | A Parent's Handbook on California Education (1986) | 3.25 |
| 0-8011-0305-3 | Paths Through High School: A California Curriculum Study (1987) | 4.00 |
| 0-8011-0671-0 | Practical Ideas for Teaching Writing as a Process (1987) | 6.00 |
| 0-8011-0309-6 | Program Guidelines for Hearing Impaired Individuals (1986) | 6.00 |
| 0-8011-0258-8 | Program Guidelines for Severely Orthopedically Impaired Individuals (1985) | 6.00 |
| 0-8011-0310-X | Program Guidelines for Visually Impaired Individuals (1986) | 6.00 |
| 0-8011-0213-8 | Raising Expectations: Model Graduation Requirements (1983) | 2.75 |
| 0-8011-0311-8 | Recommended Readings in Literature, K—8 (1986) | 2.25 |
| 0-8011-0214-6 | School Attendance Improvement: A Blueprint for Action (1983) | 2.75 |
| 0-8011-0189-1 | Science Education for the 1980s (1982) | 2.50 |
| 0-8011-0339-8 | Science Framework for California Public Schools (1978) | 3.00 |
| 0-8011-0354-1 | Science Framework Addendum (1984) | 3.00 |
| 0-8011-0665-6 | Science Model Curriculum Guide, K—8 (1987) | 3.25 |
| 0-8011-0262-6 | Secondary School Program Quality Criteria (1985) | 3.25 |
| 0-8011-0677-X | Secondary Textbook Review: General Mathematics (1987) | 6.50 |
| 0-8011-0315-0 | Selected Financial and Related Data for California Public Schools (1986) | 3.00 |
| 0-8011-0265-0 | Standards for Scoliosis Screening in California Public Schools (1985) | 2.50 |
| 0-8011-0486-6 | Statement on Preparation in Natural Science Expected of Entering Freshmen (1986) | 2.50 |
| 0-8011-0318-5 | Students' Rights and Responsibilities Handbook (1986) | 2.75 |
| 0-8011-0234-0 | Studies on Immersion Education: A Collection for U.S. Educators (1984) | 5.00 |
| 0-8011-0474-2 | Technology in the Curriculum (5 manuals, 5 diskettes) (1986) | 95.00 |
| 0-8011-0192-1 | Trash Monster Environmental Education Kit (for grade six) | 23.00 |
| 0-8011-0236-7 | University and College Opportunities Handbook (1984) | 3.25 |
| 0-8011-0344-4 | Visual and Performing Arts Framework for California Public Schools (1982) | 3.25 |
| 0-8011-0237-5 | Wet 'n' Safe: Water and Boating Safety, Grades 4—6 (1983) | 2.50 |
| 0-8011-0194-8 | Wizard of Waste Environmental Education Kit (for grade three) | 20.00 |
| 0-8011-0464-5 | Work Permit Handbook (1985) | 6.00 |
| 0-8011-0648-6 | Writing Assessment Handbook, Grade 8 (1986) | 10.00 |
| 0-8011-0270-7 | Young and Old Together: A Resource Directory of Intergenerational Resources (1986) | 3.00 |

Orders should be directed to:

California State Department of Education
P.O. Box 271
Sacramento, CA 95802-0271

Please include the International Standard Book Number (ISBN) for each title ordered.

Remittance or purchase order must accompany order. Purchase orders without checks are accepted only from governmental agencies in California. Sales tax should be added to all orders from California purchasers.

A complete list of publications available from the Department, including apprenticeship instructional materials, may be obtained by writing to the address listed above.



87 78310

FH6-477 (Second printing) 03-0412 300 6-87 10M

CAUGHT IN THE MIDDLE:
EDUCATIONAL REFORM FOR YOUNG ADOLESCENTS IN CALIFORNIA SCHOOLS

Report of the Superintendent's
Middle Grade Task Force

## THE MAJOR THEMES

1. CORE CURRICULUM: Every middle grade student should pursue a common, comprehensive, academically oriented core curriculum irrespective of primary language or ethnic background.

2. KNOWLEDGE: Every middle grade student should be empowered with the knowledge derived from studying the ideas, experiences, and traditions found in the core and exploratory curricula.

3. THINKING AND COMMUNICATION: Every middle grade student should develop the capabilities for critical thought and effective communication.

4. CHARACTER DEVELOPMENT: Every middle grades student should be helped to personalize ideals and to develop the ability to make reasoned moral and ethical choices.

5. LEARNING TO LEARN: Every middle grade student should develop a repertoire of learning strategies and study skills which emphasizes reflective thought and systematic progression toward the goal of independent learning.

6. INSTRUCTIONAL PRACTICE: Instructional practice should emphasize active learning strategies which are consistent with the goals of the core curriculum and the developmental characteristics of young adolescents.

7. ACADEMIC COUNSELING: Every middle grade student should have timely information about the relationship between the curricula of the middle and secondary grades and should be provided access to the opportunity to prepare for the broadest possible range of academic options (curriculum paths) in high school.

8. EQUAL ACCESS: Every middle grade student should have access to the most advanced levels of curricula offered during each of the middle grades; this opportunity should be facilitated through educational policies and practices which make the highest level of content mastery a valid and obtainable goal for vastly increased numbers of students.

9. STUDENT DIVERSITY AND UNDER-REPRESENTED MINORITIES: Every under represented minority middle grade student should receive encouragement and incentives to pursue academic and occupational goals.

10. AT-RISK STUDENTS: Many middle grade students are "at-risk" of dropping out of school; they should have access to educational programs which emphasize personal commitment to academic achievement.

11. PHYSICAL AND EMOTIONAL DEVELOPMENT: Many middle grade students require specific primary health care services and strong counseling and guidance programs in order to be able to concentrate their intellectual abilities on academic goals.

12. SCHOOL CULTURE: Every middle grade student should experience a positive school culture which reflects a strong student centered educational philosophy.

13. EXTRACURRICULAR AND INTRAMURAL ACTIVITIES: Every middle grades student should have access to extracurricular and intramural programs which develop a sense of personal connectedness to school through activities which promote participation, interaction, competition, and service.

14. STUDENT ACCOUNTABILITY: Every middle grade student should be accountable for significant standards of academic excellence and personal behavior.

15. TRANSITION: Every middle grade student should experience a successful and positive transition among elementary, middle, and secondary levels of school organization.

16. STRUCTURE: Middle grade education should be identified with grades 6, 7, and 8; disparities in state funding formulas among elementary, secondary, and unified school districts should be eliminated for these grades.

17. SCHEDULING: AN EXPRESSION OF MIDDLE GRADE PHILOSOPHY: The school schedule for the middle grades should be a direct reflection of a sound educational philosophy and should facilitate equal access by all students to the full range of instructional programs and student support services.

18. ASSESSMENT: Assessment programs for the middle grades should be comprehensive; they should include measurement of a broad range of educational goals related to student achievement and program effectiveness; the primary purposes of middle grades assessment should be to compile data which lead to improved curriculum and instructional programs and more effective student support services.

19. PROFESSIONAL PREPARATION: Middle grades teachers and principals should be prepared to teach/administer grades 6, 7, and 8; specialized preparation should address the content areas of the core curriculum, instructional strategies which emphasize active learning, and the developmental characteristics of young adolescents.

20. STAFF DEVELOPMENT: Middle grades teachers and principals should participate in comprehensive, well-planned, long-range staff development programs which emphasize professional collegiality.

21. PARENTS, COMMUNITIES, AND SCHOOL BOARDS: Parents, communities, and school boards should share accountability for middle grades educational reform.

22. STATE-OF-THE-ART MIDDLE GRADES SCHOOLS: A partnership involving local school districts, institutions of higher education, and the State Department of Education has been created to serve as a catalyst for middle grade educational reform throughout California. An additional network will be created in February, 1990.

## Characteristics of Middle Grade Students [1]

### A. Intellectual Development

Middle Grade Students:

1 Display a wide range of individual intellectual development as their minds experience transition from the concrete-manipulatory stage to the capacity for abstract thought. This transition ultimately makes possible:

- Propositional thought
- Consideration of ideas contrary to fact
- Reasoning with hypotheses involving two or more variables
- Appreciation for the elegance of mathematical logic expressed in symbols
- Insight into the nuances of poetic metaphor and musical notation
- Analysis of the power of a political ideology
- Ability to project thought into the future, to anticipate, and to formulate goals
- Insight into the sources of previously unquestioned attitudes, behaviors, and values
- Interpretation of larger concepts and generalizations of traditional wisdom expressed through sayings, axioms, and aphorisms

2 Are intensely curious;

3 Prefer active over passive learning experiences; favor interaction with peers during learning activities;

4 Exhibit a strong willingness to learn things they consider to be useful; enjoy using skills to solve real life problems;

5 Are egocentric; argue to convince others; exhibit independent, critical thought;

6 Consider academic goals as a secondary level of priority; personal-social concerns dominate thoughts and activities;

7 Experience the phenomenon of metacognition—the ability to know what one knows and does not know;

8 Are intellectually at-risk; face decisions that have the potential to affect major academic values with lifelong consequences.

---

1 Distilled from the writings of Bondi, Fenwick, Lipsitz, Mergendoller, Tye. (See Bibliography.)

## B. Physical Development

Middle Grade Students:

1 Experience accelerated physical development marked by increases in weight, height, heart size, lung capacity, and muscular strength;

2 Mature at varying rates of speed. Girls tend to be taller than boys for the first two years of early adolescence and are ordinarily more physically developed than boys;

3 Experience bone growth faster than muscle development; uneven muscle/bone development results in lack of coordination and awkwardness; bones may lack protection of covering muscles and supporting tendons;

4 Reflect a wide range of individual differences which begin to appear in prepubertal and pubertal stages of development. Boys tend to lag behind girls. There are marked individual differences in physical development for boys and girls. The greatest variability in physiological development and size occurs at about age thirteen;

5 Experience biological development five years sooner than adolescents of the last century; the average age of menarche has dropped from seventeen to twelve years of age;

6 Face responsibility for sexual behavior before full emotional and social maturity has occurred;

7 Show changes in body contour including temporarily large noses, protruding ears, long arms; have posture problems;

8 Are often disturbed by body changes:

- Girls are anxious about physical changes that accompany sexual maturation;
- Boys are anxious about receding chins, cowlicks, dimples, and changes in their voices;

9 Experience fluctuations in basal metabolism which can cause extreme restlessness at times and equally extreme listlessness at other moments;

10 Have ravenous appetites and peculiar tastes; may overtax digestive system with large quantities of improper foods;

11 Lack physical health; have poor levels of endurance, strength, and flexibility; as a group are fatter and unhealthier;

12 Are physically at-risk; major causes of death are homicide, suicide, accident, and leukemia.

### C. Psychological Development

Middle Grade Students:

1 Are often erratic and inconsistent in their behavior; anxiety and fear are contrasted with periods of bravado; feelings shift between superiority and inferiority;

2 Have chemical and hormonal imbalances which often trigger emotions that are frightening and poorly understood; may regress to more childish behavior patterns at this point;

3 Are easily offended and are sensitive to criticism of personal shortcomings;

4 Tend to exaggerate simple occurrences and believe that personal problems, experiences, and feelings are unique to themselves;

5 Are moody, restless; often feel self-conscious and alienated; lack self-esteem; are introspective;

6 Are searching for adult identity and acceptance even in the midst of intense peer group relationships;

7 Are vulnerable to naive opinions, one-sided arguments;

8 Are searching to form a conscious sense of individual uniqueness—"Who am I?";

9 Have emerging sense of humor based on increased intellectual ability to see abstract relationships; appreciate the "double entendre";

10 Are basically optimistic, hopeful;

11 Are psychologically at-risk; at no other point in human development is an individual likely to encounter so much diversity in relation to oneself and others.

## D. Social Development

Middle Grade Students:

1 Experience often traumatic conflicts due to conflicting loyalties to peer groups and family;

2 Refer to peers as sources for standards and models of behavior; media heroes and heroines are also singularly important in shaping both behavior and fashion;

3 May be rebellious towards parents but still strongly dependent on parental values; want to make own choices, but the authority of the family is a critical factor in ultimate decisions;

4 Are impacted by high level of mobility in society; may become anxious and disoriented when peer group ties are broken because of family relocation to other communities;

5 Are often confused and frightened by new school settings which are large and impersonal;

6 Act out unusual or drastic behavior at times; may be aggressive, daring, boisterous, argumentative;

7 Are fiercely loyal to peer group values; sometimes cruel or insensitive to those outside the peer group;

8 Want to know and feel that significant adults, including parents and teachers, love and accept them; need frequent affirmation;

9 Sense negative impact of adolescent behaviors on parents and teachers; realize thin edge between tolerance and rejection; feelings of adult rejection drive the adolescent into the relatively secure social environment of the peer group;

10 Strive to define sex role characteristics; search to establish positive social relationships with members of the same and opposite sex;

11 Experience low risk-trust relationships with adults who show lack of sensitivity to adolescent characteristics and needs;

12 Challenge authority figures; test limits of acceptable behavior;

13 Are socially at-risk; adult values are largely shaped conceptually during adolescence; negative interactions with peers, parents, and teachers may compromise ideals and commitments.

### E. Moral and Ethical Development

Middle Grade Students:

1 Are essentially idealistic; have a strong sense of fairness in human relationships;

2 Experience thoughts and feelings of awe and wonder related to their expanding intellectual and emotional awareness;

3 Ask large, unanswerable questions about the meaning of life; do not expect absolute answers but are turned off by trivial adult responses;

4 Are reflective, analytical, and introspective about their thoughts and feelings;

5 Confront hard moral and ethical questions for which they are unprepared to cope;

6 Are at-risk in the development of moral and ethical choices and behaviors; primary dependency on the influences of home and church for moral and ethical development seriously compromises adolescents for whom these resources are absent; adolescents want to explore the moral and ethical issues which are confronted in the curriculum, in the media, and in the daily interactions they experience in their families and peer groups.

SMERC Alert!
INFORMATION FOR PROFESSIONAL EXCELLENCE
November-December 1987

## CAUGHT IN THE MIDDLE: EDUCATIONAL REFORM FOR YOUNG ADOLESCENTS IN CALIFORNIA PUBLIC SCHOOLS

In the late spring of 1987, Superintendent Honig's Middle Grade Task Force culminated its year-long study by publishing *Caught in the Middle*, a reform proposal for revitalizing the "neglected grades." Their report contains 22 principles for middle grade education, operationalized by over 100 specific recommendations for local, district, and state action. This article attempts to summarize the Task Force's vision of middle grade education and to note their recommendations for beginning these reforms.

### A Unique Identity for the Middle Grade School

The Task Force seeks a unique role for the middle grade school—one it currently lacks in practice. They recommend standardizing the grade structure to grades 6-8, from the existing mix that has resulted because, "the middle grades have been treated as a wild card for solving facilities and enrollment problems." Their middle grade school is no longer a stepchild of the high school, but an entity designed specifically for its very special clientele: young adolescents. It is driven by the unique needs of early adolescence and by the critical importance of productive school experiences at this point in life.

### A Philosophy Focused on Student Development

The Task Force sees middle grade education as much more than a transition between elementary and secondary education—although that is certainly a critical function. They see the middle grades as potentially the beginning—or the end—for many students. The learning-to-learn skills developed here; the academic aspirations ignited; the recognition of school as a worthwhile place to be; and the formation at this age of a good self-image all greatly influence a child's future. Curricular and personal choices made by middle grade students, and their parents, can expand—or curtail—opportunities for future education. The middle grade school must endeavor to maximize every student's opportunities.

The middle grades deal with youngsters experiencing one of life's most volatile periods of intellectual, physical, social and emotional change. Academics are not enough at this time; attention must also be paid to the personal metamorphosis of each child.

Young adolescents need support, security, and guidance. Their school must have a spirit of optimism, challenge, and high academic expectation, but also warmth and acceptance. Every child must be touched by this climate; every child must feel "connected" to the school.

Some students need to be weaned slowly from the security of the single-teacher elementary classroom; simply throwing them into the greater independence of the high school model leaves them to flounder. Careful planning for the transitions between schools will cushion them. One of the Task Force's key ideas for providing continuity in student transition, as well as in personal development, is a strong, continual emphasis on guidance and counseling: academic counseling to insure that students make the right curricular choices and have the best possible preparation for high school; peer counseling on personal issues; and a teacher-adviser system that provides each student with an adult role model and mentor throughout all three years.

### Academic Development

Like every other aspect of the middle grade school, course content and instructional methods are based on students' developmental needs. An extended academic core block, particularly in grade 6, provides some of the security of the self-contained elementary classroom, while students develop the independence they'll need in high school through exploratory and elective courses. The humanities-based core engages student attention by focusing on the question that fascinates this age group, "Who am I?"

At this stage of cognitive development, abstract thought and judgment are emerging; therefore, all coursework must emphasize critical thinking and evaluation. To develop lifelong learning skills, attention must be paid to study and communication skills.

Children at this age are active and eager to explore, so instructional strategies should be varied, while emphasizing a "hands-on" approach. Cooperative learning activities promote social development. Student projects and homework foster independent learning skills.

SMERC *Alert* is a review of the literature on a current educational topic. It is intended as an unbiased summary and does not necessarily reflect positions or opinions of the San Mateo County Office of Education or its staff.

**San Mateo County Office of Education • Instructional Services Division**
**The SMERC Library • 333 Main Street, Redwood City CA 94063 • (415) 363-5470**

Learning must be exciting, in both content and process. Instructional materials should be more engaging, and teachers should model for their students the joys and risks of learning.

Instruction should be carefully monitored through new forms of assessment, to ensure student progress and to gauge the effectiveness of the innovative methods used.

**Equity as a Force**

Every part of the middle grade school should be available to every student. The academic core curriculum should provide every student with a common grasp of our cultural heritage and with equal instruction in learning-to-learn skills, so that each child is ready to take maximum advantage of the opportunities available in high school—and beyond. Performance expectations—not minimum competencies—for high school freshmen should be widely disseminated to facilitate students' academic planning. Exploratory and elective courses must be open to all students. Heterogeneous instructional grouping should be used. Extracurricular activities should also be open to all, for they give students additional opportunities to earn recognition and to feel "connected" to the school. A theme of exploration and expanding opportunity should permeate all aspects of the school.

All of this applies with special urgency to underserved minority youth. Special care must be taken to foster their learning skills and educational aspirations. English instruction for non-native speakers and the recruitment of more minority teachers are two methods that should be used.

**Emotional, Social, and Physical Development**

It is absolutely crucial that middle grade schools create a sense of belonging in each student, cushion their personal transitions and help them see education as valuable. Students alienated during these years are likely to remain that way.

Physical changes in students require a concern for health and fitness. The Task Force report quotes James J. Fenwick: "The transition to adolescence represents a genuine period of danger physically and emotionally for youth." Many lifelong health habits may be formed; and all too many health risks, such as substance abuse, may be explored by curious adolescents.

Moral values and character are also being developed at this age. Middle grade educators need to model ethical behavior, expect it through a firm and fair discipline code, and help students consider personal values through curricular content and activities in decision making.

**The Middle Grade Educator**

To create an environment that is friendly and supportive, while still demanding academic excellence, requires a very special educator. Middle grade students need exemplary teachers who are skilled in flexible instruction, knowledgeable about adolescent development, and—most important—genuinely fond of young adolescents and eager to help them. Middle grade teachers must have superior "human skills," as well as content knowledge and instructional virtuosity.

The Task Force recommends special training and certification for middle grade teachers, based on the qualities cited above. They also recommend special training for the middle grade principal, stressing "human skills" and the skills of program management: planning, scheduling, and evaluation. The latter are important because quality, flexibility, and valid assessment must be hallmarks of early adolescent schooling.

**Implementing Middle Grade Educational Reform**

*Caught in the Middle* discusses parent and community involvement and provides a four-page accountability matrix, assigning state and local responsibilities for the reform recommendations. Among state-level proposals are (1) the formation of a State Department of Education office for middle grade education and (2) legislative changes in school funding that will support, not inhibit, formation of grade 6-8 schools.

As a first step in actualizing their new conception, the Task Force recommends the selection* of 100 state-of-the-art middle schools throughout California. In partnership with school districts, institutions of higher education, and the State Department of Education, these schools will implement new programs, engage in research, link and catalyze efforts, and serve as clinical schools for educator training. They will be the initial focus of the statewide effort needed to implement this conception of schooling for California's young adolescents.

— Sara Lake

*This is currently being implemented through the California Regional networks of "Partnership Schools."

---

Limited copies of *Caught in the Middle* are available on loan from The SMERC Library. Copies may be purchased from the Bureau of Publications, California State Department of Education, P.O. Box 271, Sacramento, CA 95802-0271. The cost to California residents is $5.00, plus local sales tax. Any questions regarding the sale or distribution of this book should be directed to Marilyn J. Butts, Publications Sales Manager, at the above address or by phoning (916) 445-1260.